COMMERCE AND INDUSTRY INVENTORY

San Francisco Department of City Planning
OASIS
July 1993

Commerce and Industry Element of the Master Plan
Second Annual Inventory

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San Francisco Department of City Planning
Office of Analysis and Information Systems (OASIS)

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1.0 INTRODUCTION

This is the second annual San Francisco Commerce and Industry Inventory. It provides information that can be used to describe the city's economic activities. The immediate goal is to make local economic data available to the Department of City Planning, community groups, businesses, and other public and private agencies. The long term goal is to establish a consistent economic information time series and compile information for updating the Commerce and Industry Element of the San Francisco Master Plan.

This second publication of a series of annual inventories includes an update of the information presented in the 1992 Inventory. The addition of 1991 and 1992 data describes characteristics of the current recession. Some sections have incorporated 1980s data to place current events within a historical perspective. This Inventory also introduces some new indicators such as regional journey to work, citywide land use, real estate office space, and building activity.

The structure of the first Inventory is used once again to present data about employment, establishments, wages, retail sales, government revenues, land use and building activity. These data were collected from various public and private agencies and presented in a consistent format that allows for comparisons and cross-references and provides a basic framework for economic analysis and policy formulation.

The Inventory is organized into three sections: ***1.0 Introduction; 2.0 Regional Overview, and 3.0 San Francisco Economic Indicators***. The ***Introduction*** explains how the various sections of the inventory are organized, describes the methodology, and defines the data formats that are used throughout the document.

The second section, ***Regional Overview***, presents San Francisco's economy in its historical and geographical context by reviewing population, labor force, and employment indicators of the Bay Area for

the last twenty years. Information is presented by four subregions: North Bay, East Bay, South Bay, and San Francisco.

The third section, ***San Francisco Economic Indicators*** is the main body of the Inventory. This section summarizes data from various agencies, organized in four subsections: employment, establishments, transactions, and land and building uses.

The ***employment*** section describes citywide trends by Land Use Activities from 1976 to 1992. This year's update adds information on employment distribution by Commerce and Industry District from 1981 to 1990 and employment by establishment size and Commerce and Industry districts for 1990.

Establishments data, also presented by Land Use Activities, focus on the distribution of establishments by specific industries, by geographical areas, and by establishment size for 1981 through 1990. Each Land Use Activity is subdivided by industry groups to the two-digit SIC level. Commerce and Industry districts and zip code are the two geographical units used to describe the distribution of establishments. Establishments are also classified by employment size. This year's report also includes information on nonprofit organizations by District and Land Use Activity.

While the employment and establishments subsections measure the city's economic activity in terms of number of people and businesses, the third subsection provide indicators to measure the various levels of the city's economy in monetary terms. Transactions information include data related to **wages, proprietors' income, taxable sales, and city revenues and expenditures**. Wages and proprietors income figures are presented by Land Use Activities and by industry groups (SIC), describing changes over the last decade. The information for taxable sales data which only covered 1990 in the last Inventory, is expanded to cover the last ten years. Data about city revenues and expenditures are presented from 1981 to 1992. Parallel to the establishment section, this section includes information about

nonprofit organization revenues for 1993. Business revenue data are not included in this update since no new information has been released since last year.

Land and building uses provide a spatial measure of the size and location of economic activities. Building activity information for this year's report covers the past ten years and is presented by Commerce and Industry districts and Land Use Activities. Citywide data for land area and building square footage have been incorporated into this year's report.

1.1 DATA FORMATS

The data presented for the indicators mentioned above are described over time and in terms of size, type of activity, and geographical distribution. Depending upon available data and the need to show specific trends, the period of time covered ranges from a single year to the past two decades.

The Commerce and Industry Inventory provides a consistent framework for comparisons and cross-references among indicators by using two specific data formats: the Land Use Activity classification which aggregates activities, uses and industry types, and the Commerce and Industry Districts which aggregate small geographical units into large districts. The data gathered from different sources in different formats are aggregated into these two predefined formats to the extent possible. However, some of the data remain in their original formats because of limited detail; for example if the data are not disaggregated to two-SIC digits, they are presented in their original SIC format.

The ***LAND USE ACTIVITY*** classification is derived from the Standard Industrial Classification (SIC) and space use categories, by dividing all industry groups and space categories into six main activities based on the use of the land or space that the industry typically occupies and the type of activity. The Standard Industrial Classifications system was established by the U.S. Census Bureau to categorize all industries and economic activities. This classification system categorizes

business establishments according to the kind of product or service they provide. The SIC system is hierarchical. The first digit indicates the broadest categorizations; the first two digits indicate major industry groups within those broad categories; the first three digits indicate industry groups; and the four digits are the smallest unit that correspond to specific industries. This inventory generally uses two and three digit SIC codes.

The Land Use Activity classification enables the translation of economic information for studies related to land use policy development. It matches the type of economic activity with the type of building structure and the land use pattern. This classification allows evaluations of employment, establishments, and transactions within their physical environment. Since this classification has been built based on San Francisco activities and land use patterns, its application to any environment outside of the city may require some adjustments. For example, San Francisco mining activities are characterized as Office, which is not the case in other counties.

The activities defined within this classification are ***Office, Retail, Industrial, Hotel, Cultural/Institutional, and Government.*** There is also a ***Residential*** Activity that is only used in specific cases. The correspondence between Land Use Activities and SIC class system is shown on the Table 1.1.1.

Office activity includes mainly professional services such as administration, architecture, engineering, real estate, computer services, research and development activities and government administrative functions. There are three types of space considered: primary offices which mainly include headquarters and large firms in high density buildings; secondary offices which include small professional offices and services; and walk-in customer banking facilities. In some cases office space and activity are difficult to identify and isolate from other types of space and activities because many offices have been created by remodelling warehouses, other industrial buildings or even residential space. When offices are accessory to other activities, they are not identified as a separate activity.

Table 1.1.1

LAND USE ACTIVITY CLASSIFICATION

LAND USE ACTIVITY *Space Use*	EMPLOYMENT INDUSTRY GROUP	SIC CODE
OFFICE ACTIVITY *Examples: Headquarters offices, professional services, branch bank.*	Agriculture & mining	0,1
	Transportation services	47
	F.I.R.E	6
	Business services	73
	Legal services	81
	Engineering & architecture	871
	Management	874
	Accnting, research, & other serv.	872-3,89
	Public administration	9
RETAIL ACTIVITY *Examples: Stores, restaurants, bars, commercial parking lots.*	Department stores	53
	Food stores	54
	Apparel & accessory stores	56
	Eating & drinking places	58
	Other retail stores	52,5,7,9
	Personal services	72
	Auto repair and services	751,3,4
	Automobile parking	752
	Miscellaneous repair services	76
INDUSTRIAL ACTIVITY *Examples: Warehouses, factories, workshops, showrooms, port facilities.*	Food manufacturing	20
	Apparel manufacturing	23
	Printing & publishing	27
	Electronic manufacturing	36
	Other manufacturing	30-5, 37-9
	Durable goods wholesale	50
	Non durable goods wholesale	51
	Construction	15-17
	Transportation	40-2,44-5
	Communication	48
	Other public utilities	43,46,49
HOTEL ACTIVITY *Examples: hotels, motels, B&Bs.*	Hotel	70
CULTURAL/ INSTITUTIONAL ACTIVITY *Examples: Theaters, museums, nightclubs , hospitals, libraries, schools, churches.*	Museums	805-09
	Membership organizations	82
	Amusement & recreation	83
	Motion picture	84
	Health services	86
	Educational services	79
	Social services	78
GOVERNMENT ACTIVITY	Can be classified as Federal, State, and Local, according to data sources. Can include Office, Industrial, Cultural and Institutional spaces	
RESIDENTIAL ACTIVITY	Classification included in land use and construction activity sections	

Sources:

Department of City Planning

US Office of Management and Budget, Standard Industrial Classification

Retail activity includes large and small scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, auto repair shops, beauty shops, etc. Activity and space use are better correlated for Retail activity than for Office activity.

The ***Industrial*** category covers activities related to processing and movement of goods and provision of city-wide infrastructure. It includes manufacturing, wholesale, construction, transportation, communication, and public utilities. Most of these activities take place in large buildings and structures that can house machinery and industrial equipment. However, some of the food manufacturing and printing activities are located in small shops due to the small scale of production and machinery required.

Hotel activity is defined as a separate Land Use Activity because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, bed and breakfast.

Cultural/Institutional activities cover the social spectrum of the economy by including entertainment and artistic activities as well as health and educational services. This category covers the widest variety of space types from large establishments (hospitals, schools, museums, etc.) to small studios or businesses (nightclubs, art studios, etc.). These activities are more disparate than the other categories. They have some common characteristics: large, specialized facilities and are often nonprofit in organization. Because of the diversity, this category should be disaggregated into Cultural, Institutional, and Entertainment, wherever this provides a more meaningful analysis.

Government activity includes Office, Industrial, and Cultural/Institutional activities. This category is not characterized by specific activity, space, or land use pattern but is defined as a separate category because several data sources classify government as a separate

employment or establishment category to facilitate standard economic analysis.

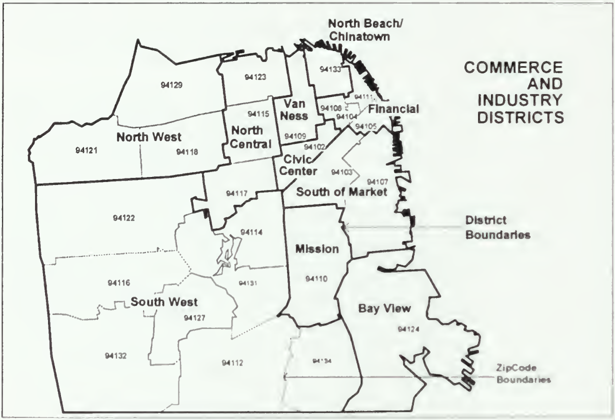
Residential activity is an additional category that is only considered when describing land or building uses and construction activity. It is not used in descriptions of employment, establishments, or transactions.

The ***COMMERCE AND INDUSTRY (C&I) DISTRICTS*** are characterized by predominant economic activities, employment concentration, business density, and other spatial characteristics. Each district is defined by one or more zip codes, because zip code is usually the smallest geographical unit for which economic data are available. The district boundaries were also established to be as close as possible to census tract boundaries, so that data available from the census can be meaningfully compared to economic data. The Commerce and Industry district boundaries are shown on map 1.1 on page 8.

Districts are defined by their concentration or specialization in one type of Land Use Activity or similar neighborhood commercial activities. The Mission as well the North Beach/Chinatown districts present intense local retail activities and have very defined identities for the local and visitor population. The Bay View district houses an increasing number of industrial sites and shows a low density in terms of population, employment, and establishments. The Civic Center is defined by its high concentration of institutional and government activities. The Van Ness district is delineated around a commercial corridor and some residential activity. The North Central district also concentrates a great proportion of institutional activities, mainly health related. This is a transitional area between downtown and the more peripheral residential area. South of Market displays a combination of office and industrial activities, located between the Financial district and Bay View. The Financial district covers the most dense area and the highest concentration of employment and establishments. The South West and North West districts are predominantly residential with a very low business density.

The Commerce and Industry District formats are used when the original data are disaggregated by zip code, census tract or any smaller unit. As collection of detailed data improves, it is intended to consistently use this framework for most of the data presented in the Commerce and Industry Inventory annual series for purposes of comparison and trend analysis.

MAP 1.1



2.0 REGIONAL OVERVIEW

San Francisco plays an important role as an urban center with diverse linkages to the regional, state, and national economies. Because of this role, historical and regional references are included in the inventory for a better understanding of current San Francisco trends. The purpose of this section is to describe San Francisco in relation to its regional context over time by looking at the Bay Area population, labor force and employment; the distribution of regional employment by industry group; and commute patterns. The distribution of regional labor force and employment, and how this distribution changes over time, is an indication of the spatial organization of the region's economy.

This section describes population, labor force, and employment trends over the past two decades with the 1970, 1980, and 1990 U.S. Census figures, as presented in last year's inventory. In addition, it incorporates 1991 and 1992 population estimates to describe some of the most recent changes and reflect the influence of the recession. These past two years have shown significant changes in labor force and employment, especially the loss of service jobs in the South Bay and San Francisco.

The data presented last year have been revised and adjusted according to the data reported by the Bureau of the Census and the California Employment Development Department (EDD). These adjustments provide consistency for comparison over time and among subregions. Population data from 1970 to 1990 are provided by the Bureau of the Census and the 1991 and 1992 data were estimates from EDD based on Census data. Labor force and employment data for 1970, 1980, and 1990 are from the Annual Planning Information reports prepared by EDD at the county level.

The labor force and employment data for 1991 and 1992 were estimated from information provided by EDD at the level of Metropolitan Statistical Areas (each of which include several counties). These data were the only available for the entire region and these past two years and allowed for comparisons throughout the report. The employment figures for San Francisco presented in this regional section differ from the figures presented in the employment section because the latter used more detailed and precise information at the county level.

The indicators used in this section are defined according to the original data sources. The Bureau of the Census includes under ***civilian labor force*** employed persons and unemployed persons, excluding members of the armed forces. Unemployment is defined as "..civilians 16 years old and over not at work who were actively looking for work during the last four weeks and were available to accept a job or who were waiting to be called back to a job from which they have been laid off." Labor force data are collected by place of residence; a member of the labor force who lives in the East Bay is part of the East Bay labor force, no matter where he or she is employed. ***Employment***, as used in this Inventory and defined by the California Employment Development Department includes "civilians 16 years old and over who were either: at work.., or temporarily absent from work due to illness, vacation, strike, or other personal reasons." Employment data are collected by place of employment. Someone holding a job in San Francisco is part of the San Francisco employment pool no matter where he or she lives.

The regional data included in this section have been summarized by four subregions: North Bay, East Bay, South Bay, and San Francisco. These subregions group the nine counties in the Bay Area based on their geographic location and commute patterns. The North Bay includes Marin, Sonoma, Napa, and Solano counties. The East Bay includes Contra Costa and Alameda counties. The South Bay includes Santa Clara and San Mateo counties. San Francisco is defined by its county boundaries.

MAP 2.1.1

The four subregions , NorthBay, East Bay, South Bay and San Francisco, and their boundaries are shown here.

This regional subdivision allows comparisons between San Francisco and the North Bay, East Bay, and South Bay- areas that represent the labor force base for San Francisco and the region, and define the three commute corridors into San Francisco. However, when looking at the following tables it should be considered that the Bay Area covers 7,041 square miles of which the North Bay represents 53 percent, the East Bay 21 percent, the South Bay 25 percent, while San Francisco represents less than 1 percent.

2.1 EMPLOYMENT, POPULATION, AND LABOR FORCE IN THE BAY AREA

Over the last two decades, the regional population, labor force and employment have each increased about a million and a half. This represented a small increase of population by one third, a moderate increase of the labor force by 75 percent and a significant increase of employment which more than doubled. From 1970 to 1992, the Bay Area population has grown at almost a regular pace of 1.67 percent per year. Labor force and employment showed an average annual growth of 3.2 and 5.7 respectively. They both had a larger increase during the 1970s than during the 1980s.

Tables 2.1.1, 2.1.2, and 2.1.3, illustrate the large size of San Francisco employment in relation to its local labor force and population. While San Francisco population and labor force represent about 12 percent of the regional total, employment represents more than 18 percent of the region. San Francisco is the only subregion which has historically had (and has currently) more jobs than the resident labor force,

BAY AREA POPULATION, LABOR FORCE AND EMPLOYMENT
(Thousands of people)

Table 2.1.1

POPULATION	1970	1980	1990	1991	1992
North Bay	640	857	1,070	1,092	1,124
East Bay	1,632	1,762	2,083	2,112	2,150
South Bay	1,621	1,882	2,147	2,170	2,184
San Francisco	716	679	724	727	729
TOTAL	4,608	5,180	6,024	6,101	6,187

LABOR FORCE	1970	1980	1990	1991	1992
North Bay	241	406	536	546	566
East Bay	669	877	1,090	1,096	1,121
South Bay	686	1,017	1,172	1,158	1,196
San Francisco	340	365	396	393	407
TOTAL	1,936	2,702	3,193	3,192	3,291

EMPLOYMENT	1970	1980	1990	1991	1992
North Bay	101	275	391	392	402
East Bay	388	690	905	892	879
South Bay	444	937	1,149	1,130	1,122
San Francisco	375	554	574	553	544
TOTAL	1,307	2,456	3,018	2,967	2,947

Source: Department of City Planning
Employment Development Department
Bureau of the Census

Table 2.1.2 BAY AREA POPULATION, LABOR FORCE AND EMPLOYMENT
Percentage change annual average

POPULATION	1970-80	1980-90	1990-91	1991-92	1970-92
North Bay	3.4	2.5	2.1	2.9	3.4
East Bay	0.8	1.8	1.4	1.8	1.4
South Bay	1.6	1.4	1.1	0.6	1.6
San Francisco	-0.5	0.7	0.4	0.3	0.2
TOTAL	1.3	1.6	1.3	1.4	1.6

LABOR FORCE	1970-80	1980-90	1990-91	1991-92	1970-92
North Bay	6.8	3.2	1.9	3.6	6.1
East Bay	3.1	2.4	0.5	2.3	3.1
South Bay	4.8	1.5	-1.2	3.3	3.4
San Francisco	0.7	0.8	-0.7	3.6	0.9
TOTAL	4.0	1.8	0.1	3.1	3.4

EMPLOYMENT	1970-80	1980-90	1990-91	1991-92	1970-92
North Bay	17.2	4.2	0.2	2.5	13.5
East Bay	7.8	3.1	-1.4	-1.5	5.8
South Bay	11.1	2.3	-1.7	-0.7	6.9
San Francisco	4.8	0.4	-3.6	-1.6	2.1
TOTAL	8.8	2.3	-1.7	-0.7	5.7

Source: Department of City Planning
Employment Development Department
Bureau of the Census

indicating that people commute into San Francisco, and that regional economic activity is still concentrated in San Francisco. The other three subregions have larger resident labor forces than the number of jobs. However, since 1970, the overall growth in regional employment (125 percent) was greater than the growth in labor force (70 percent), which indicates that the number of workers coming in from outside the region has increased.

As shown in Table 2.1.2, population, labor force, and employment all increased between 1970 and 1990, and each of these variables increased in each decade in each subregion, except for a 0.5 annual average percent decrease in San Francisco's population during the 1970s. North Bay shows the highest annual rates of growth in all three indicators, followed by the South Bay, East Bay, and San Francisco.

From the 1970s to the 1980s, San Francisco and the East Bay increased their annual rate of population growth, while the North Bay and South Bay rates declined. During the early 1990s, San Francisco

BAY AREA POPULATION, LABOR FORCE AND EMPLOYMENT
Percentage distribution by sub-region

Table 2.1.3

POPULATION	1970	1980	1990	1991	1992
North Bay	13.9	16.5	17.8	17.9	18.2
East Bay	35.4	34.0	34.6	34.6	34.8
South Bay	35.2	36.3	35.6	35.6	35.3
San Francisco	15.5	13.1	12.0	11.9	11.8
TOTAL	100.0	100.0	100.0	100.0	100.0

LABOR FORCE	1970	1980	1990	1991	1992
North Bay	12.5	15.0	16.8	17.1	17.2
East Bay	34.6	32.4	34.1	34.3	34.1
South Bay	35.4	37.6	36.7	36.3	36.4
San Francisco	17.6	13.5	12.4	12.3	12.4
TOTAL	100.0	100.0	100.0	100.0	100.0

EMPLOYMENT	1970	1980	1990	1991	1992
North Bay	7.7	11.2	13.0	13.2	13.6
East Bay	29.6	28.1	30.0	30.1	29.8
South Bay	34.0	38.2	38.0	38.1	38.1
San Francisco	28.6	22.5	19.0	18.6	18.5
TOTAL	100.0	100.0	100.0	100.0	100.0

Source: Department of City Planning
Employment Development Division
Bureau of the Census

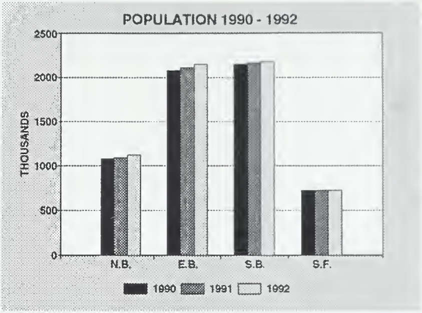
and the South Bay population annual growth rates declined, the North Bay rate increased, and the East Bay rate remained the same. The annual rates of growth for labor force were higher in the 1970s than in the 1980s for all subregions but San Francisco. During the 1970s and 1980s, the population rates of growth were greater than the labor force rates. Labor force increased 4 percent per year during the 1970s but during the 1980s, the rate of growth slowed down to 1.8 percent.

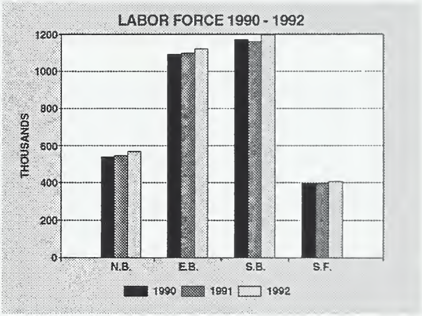
Looking at the Bay Area total employment, from 1980 to 1990, we see an annual growth of 2.3 percent, reaching more than three million employees in 1990. The annual rates of growth were much higher during the 1970s than during 1980s and the 1990s. From 1990 to 1992, the region has shown increases in population and labor force of more than two percent while employment decreased more than two percent. Regional employment declined from 1990 to 1992, by more than 100,000 jobs. This employment decline slowed somewhat between 1991 and 1992.

Graph 2.1.1

BAY AREA POPULATION, LABOR FORCE, AND EMPLOYMENT 1990-1992

Changes in regional labor force and employment look more favorable between1991 and 1992 than between 1990 and 1991. While population and labor force in the East Bay and South Bay increased, employment declined. The North Bay shows an increase in population, labor force and employment. San Francisco shows little change in population and labor force, but a decline in employment.





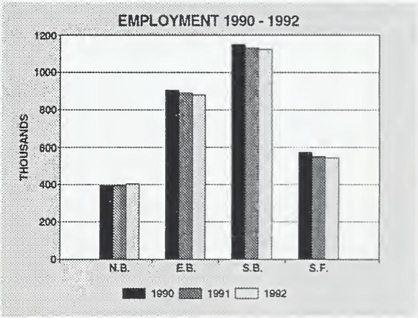


Table 2.1.3 shows the percentage share of each of these three variables held by each of the subregions. San Francisco's share of the region's population has declined from 16 percent to 12 percent; the North Bay's share has increased from 14 percent to 18 percent; the other subregions have remained about the same. Similarly, San Francisco's share of the region's labor force has declined from 18 percent to 12 percent; the North Bay's share has increased from 13 percent to 17 percent; the other subregions have remained about the same. There has been a steady decentralization of jobs from San Francisco. In 1970, 29 percent of the region's jobs were in San Francisco; in 1992 this had declined to 19 percent of the region's jobs. This loss of share was picked up by the North Bay, which went from 8 percent to 14 percent; and the South Bay, which went from 34 percent to 38 percent of the region's jobs.

Over the last three years, the North Bay is the only subregion which expanded its employment base, adding almost 3 percent to its total number of jobs. During the same period of time, San Francisco experienced the largest percentage decline of all subregions within the Bay Area (almost -5 percent). However, the employment decline of -3.6 percent from 1990 to 1991 slowed down to -1.6 percent from 1991 to 1992. San Francisco and the East Bay have reduced their regional employment share while the North Bay increased and the South Bay remained the same.

2.2 REGIONAL EMPLOYMENT BY INDUSTRY GROUP

The tables included in this section are based on Employment Development Department (EDD) data, covering the period from 1980 to 1990, every five years. This year's report also includes data for 1991 and 1992. The employment data are classified by SIC group at the one digit level, which include ten main categories. These data are presented first, for the entire Bay Area region by industry group, and then each industry group is disaggregated into the four subregions: North Bay, East Bay, South Bay, and San Francisco. The tables presented in this section are organized as follows: first, absolute number of employees; second, percentage distribution by industry group or subregion; and third, the annual average percentage change.

Table 2.2.1 describes the regional employment distribution by main industries. By 1992, almost one-third of regional employment was in services, followed by retail, manufacturing and government. From 1980 to 1992, service employment's share increased seven percentage points, Government declined by six percentage points since 1985. The shares of manufacturing and retail remained more or less the same over this period.

From 1980 to 1990, employment in services showed the largest absolute increase of 285,000 employees and the largest annual percentage change of 5 percent. From 1990 to 1991, this trend was reversed and employment declined by about 1,000 jobs.

From 1980 to 1992, retail, wholesale trade and F.I.R.E. also showed substantial growth, with overall increases of 83,000, 29,000, and 26,000 employees, respectively. However, these three employment groups declined from 1990 to 1992.

From 1980 to 1990, regional employment in manufacturing, communication and utilities declined. These industries declined even faster over the last three years, from 1990 to 1992.

Table 2.2.2 and table 2.2.3 disaggregate employment by subregion. These tables show that San Francisco still has the greatest concentration of F.I.R.E. jobs within the region in spite of the decline in its share from 47 percent in 1980 to 35 percent in 1992. A similar pattern is seen in the service sector where San Francisco had a significant participation, but where it had lost about 8 percent share, leading to an increase of the East Bay and North Bay. During the 1980s, the greatest losses in regional share for San Francisco besides the F.I.R.E. sector, have been within wholesale trade, communication and utilities, and transportation. The city's regional shares in these sectors have declined by 12 percent each.

The South and East Bay kept the same shares of total manufacturing employment at 60 and 23 percent while San Francisco's share declined and the North Bay's increased. The South Bay's largest regional employment shares were found within manufacturing with 60 percent, wholesale trade with 44 percent, and transportation with 46 percent. The East Bay showed its greatest regional employment shares within communication and utilities with 42 percent, followed by government and construction with 38 and 35 percent. The North Bay's largest regional shares were in construction with 19 percent, retail and government, each with 17 percent.

Table 2.2.1

BAY AREA EMPLOYMENT BY INDUSTRY GROUP
(Thousands of Jobs)
1980 - 1992

INDUSTRY	1980	1985	1990	1991	1992
SERVICES	547	667	832	831	834
RETAIL	391	453	501	484	474
MANUFACTURING	476	493	492	485	470
F.I.R.E.	183	203	213	210	209
CONSTRUCTION	105	126	147	129	124
WHOLESALE TRADE	138	158	175	171	167
GOVERNMENT	426	426	458	458	445
TRANSPORTATION	93	98	105	105	106
COMMUNICATION/UTILITIES	68	75	69	67	66
MINING/AGRICULTURE	28	26	27	24	27
	2,456	2,725	3,019	2,964	2,922

BAY AREA EMPLOYMENT BY INDUSTRY GROUP
Percentage distribution by industry group
1980 - 1992

INDUSTRY	1980	1985	1990	1991	1992
SERVICES	22	24	28	28	29
RETAIL	16	17	17	16	16
MANUFACTURING	19	18	16	16	16
F.I.R.E.	7	7	7	7	7
CONSTRUCTION	4	5	5	4	4
WHOLESALE TRADE	6	6	6	6	6
GOVERNMENT	17	16	15	15	15
TRANSPORTATION	4	4	3	4	4
COMMUNICATION/UTILITIES	3	3	2	2	2
MINING/AGRICULTURE	1	1	1	1	1
	100	100	100	100	100

BAY AREA EMPLOYMENT BY INDUSTRY GROUP
Percentage annual change
1980 - 1992

INDUSTRY	1980-85	1985-90	1990-91	1991-92	1980-92
SERVICES	4.4	5	-0.1	0.4	4.4
RETAIL	3.2	2.2	-3	-2	1.8
MANUFACTURING	0.8	0	-1	-3	0
F.I.R.E.	2.2	1	-1	0	1.2
CONSTRUCTION	4	3.4	-12.2	-4	1.5
WHOLESALE TRADE	2.8	2.2	-2	-2	1.8
GOVERNMENT	0	1.6	0	-3	0.3
TRANSPORTATION	1	1.4	0	1	1.2
COMMUNICATION/UTILITIES	2	-1.6	-3	-1	-0.3
MINING/AGRICULTURE	-1.4	0.8	-11	13	-0.4
	2.2	2.6	-4	0	1.7

Source: Department of City Planning
Employment Development Department

BAY-AREA EMPLOYMENT BY INDUSTRY GROUP AND SUBREGION
(Thousands of Jobs)
1980 - 1992

Table 2.2.2

CATEGORY/ Subregion	1980	1985	1990	1991	1992
SERVICES:					
North Bay	58	74	101	105	107
East Bay	136	172	226	231	230
South Bay	200	250	303	303	304
San Francisco	154	171	203	192	193
Regional Total	547	667	832	831	834
RETAIL					
North Bay	56	68	84	83	82
East Bay	128	149	168	159	155
South Bay	139	161	170	167	164
San Francisco	69	75	79	75	74
Regional Total	391	453	501	484	474
MANUFACTURING					
North Bay	30	35	40	38	37
East Bay	111	103	113	113	110
South Bay	285	312	299	294	283
San Francisco	51	43	40	40	40
Regional Total	476	493	492	485	470
F.I.R.E					
North Bay	17	21	24	25	25
East Bay	37	47	58	56	55
South Bay	43	51	55	56	55
San Francisco	86	84	77	74	74
Regional Total	183	203	213	210	209
CONSTRUCTION					
North Bay	15	20	29	25	24
East Bay	37	45	52	46	43
South Bay	40	47	50	43	43
San Francisco	13	14	16	14	14
Regional Total	105	126	147	129	124

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At the regional level, services and transportation are the only employment groups that grew from 1990 to 1992 by 2,000 employees.

Overall, the employment decline between 1990 and 1992 in most industries slowed down between 1991 and 1992.

(continued from previous page)

CATEGORY/ Subregion	1980	1985	1990	1991	1992
WHOLESALE TRADE					
North Bay	9	12	16	16	16
East Bay	38	45	52	54	53
South Bay	54	65	78	74	72
San Francisco	38	35	30	26	26
Regional Total	138	158	175	170	167
GOVERNMENT					
North Bay	69	71	76	75	74
East Bay	154	154	168	168	168
South Bay	114	112	122	123	119
San Francisco	89	89	93	92	84
Regional Total	426	426	458	458	445
TRANSPORTATION					
North Bay	5	6	7	7	7
East Bay	27	28	32	31	30
South Bay	37	43	46	47	49
San Francisco	25	22	21	20	21
Regional Total	93	98	105	105	107
COMMUNICATION AND UTILITIES					
North Bay	7	7	7	7	7
East Bay	16	23	30	29	28
South Bay	17	18	14	15	15
San Francisco	28	27	19	17	17
Regional Total	68	75	69	67	66
MINING AND AGRICULTURE					
Regional Total	28	26	27	24	27

Source: Department of City Planning
Employment Development Department

BAY-AREA EMPLOYMENT BY INDUSTRY GROUP AND SUBREGION
Percentage distribution by subregion
1980 - 1992

Table 2.2.3

CATEGORY/ Subregion	1980	1985	1990	1991	1992
SERVICES:					
North Bay	11	11	12	13	12
East Bay	25	26	27	28	28
South Bay	37	37	36	36	36
San Francisco	28	26	24	23	24
Regional Total	100	100	100	100	100
RETAIL					
North Bay	14	15	17	17	17
East Bay	33	33	33	33	33
South Bay	36	36	36	35	35
San Francisco	18	17	17	16	16
Regional Total	100	100	100	100	100
MANUFACTURING					
North Bay	6	7	8	8	8
East Bay	23	21	23	23	23
South Bay	60	63	61	61	60
San Francisco	11	9	8	8	8
Regional Total	100	100	100	100	100
F.I.R.E					
North Bay	9	10	11	12	12
East Bay	20	23	27	27	26
South Bay	24	25	26	26	26
San Francisco	47	41	36	35	35
Regional Total	100	100	100	100	100
CONSTRUCTION					
North Bay	14	16	20	20	19
East Bay	36	36	36	36	35
South Bay	38	37	34	34	35
San Francisco	12	11	11	11	11
Regional Total	100	100	100	100	100

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CATEGORY/ Subregion	1980	1985	1990	1991	1992
WHOLESALE TRADE					
North Bay	6	8	9	6	10
East Bay	27	29	29	34	32
South Bay	39	41	44	42	43
San Francisco	27	22	17	18	15
Regional Total	100	100	100	100	100
GOVERNMENT					
North Bay	16	17	17	16	17
East Bay	36	36	37	37	38
South Bay	27	26	27	27	27
San Francisco	21	21	20	20	19
Regional Total	100	100	100	100	100
TRANSPORTATION					
North Bay	5	6	7	7	7
East Bay	29	28	30	29	28
South Bay	39	44	43	45	46
San Francisco	27	22	19	19	20
Regional Total	100	100	100	100	100
COMMUNICATION AND UTILITIES					
North Bay	11	9	10	10	10
East Bay	24	30	43	43	42
South Bay	25	24	21	22	23
San Francisco	41	36	27	26	26
Regional Total	100	100	100	100	100

Source: Department of City Planning
Employment Development Department

BAY-AREA EMPLOYMENT BY INDUSTRY GROUP AND SUBREGION
Percentage Change: Annual Average
1980 - 1992

Table 2.2.4

CATEGORY/ Subregion	1980-85	1985-90	1990-91	1991-92
SERVICES:				
North Bay	6	7	4	1
East Bay	5	6	2	-1
South Bay	5	4	0	0
San Francisco	2	4	-5	.5
Regional Total	4	5	-0.1	1.4
RETAIL				
North Bay	4	5	-2	-1
East Bay	3	3	-5	-3
South Bay	3	1	-2	-2
San Francisco	2	1	-5	-1
Regional Total	3	2	-3	-2
MANUFACTURING				
North Bay	3	3	-5	-3
East Bay		2	0	-3
South Bay	2	-1	-2	-4
San Francisco	-3	-1	0	0
Regional Total	1	0	-2	-3
F.I.R.E				
North Bay	5	3	3	0
East Bay	5	5	-3	-2
South Bay	4	2	1	-1
San Francisco	0	-2	-4	0
Regional Total	2	1	-1	-1
CONSTRUCTION				
North Bay	7	9	-13	-4
East Bay	4	3	-12	-6
South Bay	4	1	-13	0
San Francisco	2	3	-10	-3
Regional Total	4	3	-12	-4

From 1991 to 1992 the decline of San Francisco employment by industries slowed down. San Francisco and the South Bay show a greater employment decline in most industries than the North Bay and the East Bay.

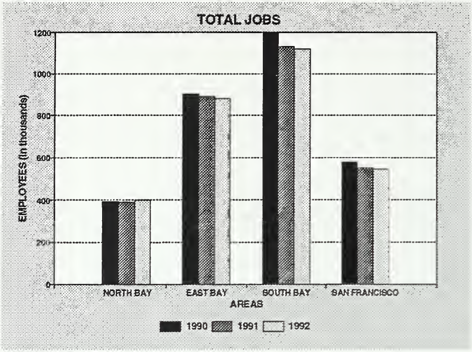
(continued next page)

(continued from previous page)

CATEGORY/ Subregion	1980-85	1985-90	1990-91	1991-92
WHOLESALE TRADE				
North Bay	7	7	0	0
East Bay	4	3	4	-2
South Bay	4	4	-5	-3
San Francisco	-2	-3	-13	0
Regional Total	3	2	-3	-2
GOVERNMENT				
North Bay	1	1	-2	-1
East Bay	0	2	0	0
South Bay	0	2	1	-3
San Francisco	0	1	-1	-9
Regional Total	0	2	0	-3
TRANSPORTATION				
North Bay	4	3	1	-8
East Bay	1	3	-4	-3
South Bay	3	1	2	3
San Francisco	-2	-1	-3	4
Regional Total	1	1	0	2
COMMUNICATION AND UTILITIES				
North Bay	0	0	-7	3
East Bay	9	6	-5	-3
South Bay	1	-4	6	1
San Francisco	-1	-6	-9	0
Regional Total	2	-2	-3	-1
MINING AND AGRICULTURE				
Regional Total	-1	1	-11	12.5

Source: Department of City Planning
Employment Development Department

Graph 2.2.1

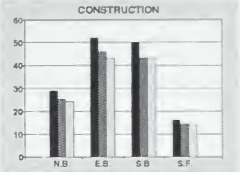


Graphs 2.2.1 and 2.2.2 compare the employment change among subregions during the years of recession, from 1990 to 1992. Overall, the loss of employment was worse from 1990 to 1991 than from 1991 to 1992. During these past years, the North Bay showed the most stable employment in all industries but construction; San Francisco and the South Bay showed the most significant decline in employment. In all sub regions, the decline from 1990 to 1991 was greater than from 1991 to 1992. The North Bay was the only subregion that showed employment growth from 1991 to 1992. The North Bay employment growth was based on Services and Communication and Utilities.

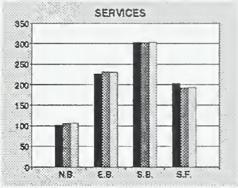
Retail, communication and utilities, and construction industries declined in all subregions; with construction industries showing the sharpest decline. Services, F.I.R.E., and government were the most stable industries with small declines for all subregions but San Francisco.

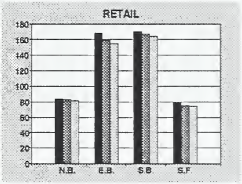
Graph 2.2.2 Employment by Industry Group and Subregion 1990-1992

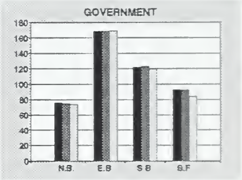
(note differences in scale)

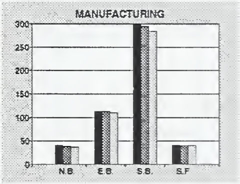


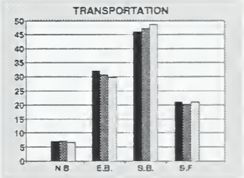
Each graph correponds to one industry group and describes the number of employees in 1990, 1991, and 1992 for each subregion.

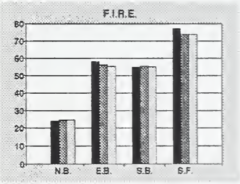


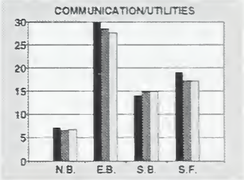












2.3 DISTRIBUTION OF EMPLOYEES BY RESIDENCE AND WORK PLACE WITHIN THE REGION, 1990

This year's report introduces a new regional employment indicator to describe commute patterns within and outside the region. These data show employees' workplaces in relation to their place of residence. The information was collected by the 1990 Census and summarized in Table 2.2.5. In addition to the four subregions used in this section, this table also includes data for all the counties surrounding the Bay Area under "Adjacent Counties" and for all other counties within California under "Rest of CA".

San Francisco attracted the largest number of workers (260,000) from other counties while the North Bay attracted the smallest (37,000). Over 45 percent of San Francisco's total work force commuted from other areas of the region; 9 percent coming from the North Bay, 15 percent from the South Bay, and 19 percent from the East Bay.

The Bay Area covers 7,041 square miles of which the North Bay represents 53 percent, the East Bay 21 percent, the South Bay 25 percent, and San Francisco less than 1 percent.

The East Bay commute to San Francisco comprised the largest flow of workers from one subregion to another (109,000) followed by the number of commuters from the East to South Bay commute (93,000); and the South Bay to San Francisco commute (87,000).

The East Bay had the largest number of workers commuting outside of their subregion of residence (230,000) while San Francisco had the smallest number (75,000).

Over three-fourths of workers lived and worked in the same subregion. The South Bay showed the highest percent of local resident workers (86), followed by San Francisco (80), the East Bay (79), and the North Bay (77).

Table 2.2.5

JOURNEY TO WORK WITHIN THE REGION
1990

Workplace / RESIDENCE	North Bay	East Bay	South Bay	San Francisco	Adj Counti	Rest of CA	TOTAL
North Bay	404,413	46,121	9,663	52,920	NA	4,342	525,797
East Bay	14,984	805,116	92,899	108,511	4,488	8,366	1,034,364
South Bay	2,403	53,128	986,951	86,616	NA	10,703	1,143,164
San Francisco	6,037	25,095	40,453	307,400	680	2,644	382,309
Adj. Counties	8,975	24,688	17,560	2,941	NA	NA	54,164
Rest of CA	4,966	13,940	58,668	9,874	NA	NA	87,448
Total Regional Workers	441,778	967,638	1,206,194	568,262	16,869	26,055	3,227,246

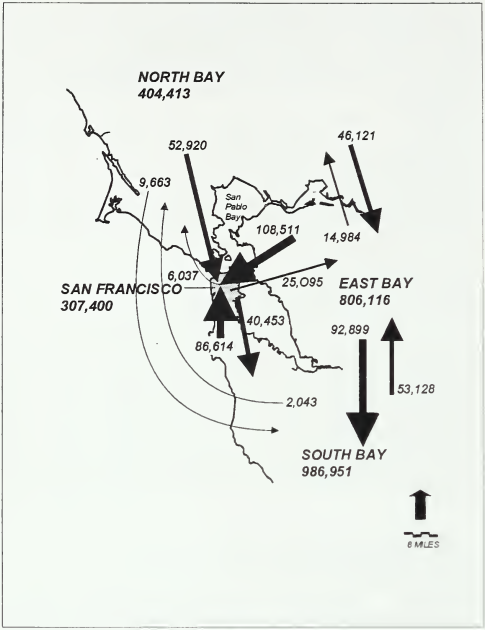
JOURNEY TO WORK WITHIN THE REGION
Percentage distribution by work place
1990

Workplace / RESIDENCE	North Bay	East Bay	South Bay	San Francisco	Adj. Counti	Rest of CA	TOTAL
North Bay	91.5	4.8	0.8	9.3	49.4	16.7	16.3
East Bay	3.4	83.2	7.7	19.1	26.6	32.1	32.1
South Bay	0.5	5.5	81.8	15.2	19.9	41.1	35.4
San Francisco	1.4	2.6	3.4	54.1	4.0	10.1	11.8
Adj. Counties	2.0	2.6	1.5	0.5	NA	NA	1.7
Rest of CA	1.1	1.4	4.9	1.7	NA	NA	2.7
Total Regional Workers	100	100	100	100	100	100	100

JOURNEY TO WORK WITHIN THE REGION
Percentage distribution by residence place
1990

Workplace / RESIDENCE	North Bay	East Bay	South Bay	San Francisco	Adj. Counti	Rest of CA	TOTAL
North Bay	76.9	8.8	1.8	10.1	1.6	0.8	100
East Bay	1.4	77.8	9.0	10.5	0.4	0.8	100
South Bay	0.2	4.6	86.3	7.6	0.3	0.9	100
San Francisco	1.6	6.6	10.6	80.4	0.2	0.7	100
Adj. Counties	16.6	45.6	32.4	5.4	NA	NA	100
Rest of CA	5.7	15.9	67.1	11.3	NA	NA	100
Total Regional Workers	13.7	30.0	37.4	17.6	0.5	0.8	100

(Adjacent Counties: Mendocino, Lake, Yolo, Sacramento, San Joaquin, Stanislaus, Merced, San Benito, Monterey. Other CA: California without "Bay Area" and "Adjacent Counties")
Source: Census Data 1990



MAP 2.3.2
JOURNEY TO WORK

Arrows go from region of residence to place of work. Number associated with each arrow indicates the amount of workers commuting from their residence to work. Numbers under regional titles indicate the number of people who live and work within the region. From the East Bay, 108,511 people commute to work in San Francisco. Within the South Bay, 986,951 people live and work.

3.0 SAN FRANCISCO ECONOMIC INDICATORS

3.1 EMPLOYMENT

The information included in this section focuses on employment trends between 1976 and 1992 and the distribution of employment by Land Use Activity, geography and establishment size. These data have been provided by the California Employment Development Department (EDD), an agency that collects and presents county wide employment data by the Standard Industrial Classification (SIC) codes to the two digit level. This year's report adds data for 1991 and 1992 which illustrate the recent employment decline in almost all activities due to the recession. However, the actual employment decline from 1990 to 1991 may not be as severe as shown in this set of data because the data collection procedures changed in 1991 and the number of San Francisco employees reported might have been reduced due to this change. The new procedures required employers to report employment figures by physical location. Prior to 1991, employers only reported total number of employees for a single business including all employment from all locations, some of whom may have worked outside of San Francisco. Consequently, the pre-1991 employment levels might be inflated. During 1991, the new procedures were partially implemented and during 1992 they were almost completely implemented. These data have not been adjusted to account for discrepancies in reporting by large firms, which may cause these numbers to differ from other EDD sources.

The employment data are first presented by Land Use Activities, with SIC codes aggregated into six main categories. Then, a set of line graphs for each Land Use Activity display more detailed information on employment trends by SIC groups. A definition of the Land Use Activity classification and detail on the specific SIC codes grouped into each of the six activities are included in the Introduction, Data formats section, on page 3.

A second set of data, from the County Business Patterns report developed by the US Department of Commerce, has been used to provide information about employment distribution by geography and by establishment size. The advantage of using these data is the availability of detailed information disaggregated by zip code. However, the disadvantage is that the data only include number of establishments and do not specify number of jobs. Therefore, employment estimates are prepared based on establishment data by size class. The original data by zip code are classified according to the Commerce and Industry Districts which are defined in the Introduction, Data formats section on page 3. While last year's report only included 1987 data, this update includes employment information by Commerce and Industry District for a ten year period, from 1981 to 1990.

3.1.1 EMPLOYMENT BY LAND USE ACTIVITY

San Francisco employment between 1976-1992 grew from 400,994 to 536,986, a net increase of 135,992 employees. The largest employment in San Francisco was recorded in 1989 as 582,078 employees. This was followed by three years of decline to 536,986 employees in 1992. In absolute terms, from 1976 to 1992, three activities generated most of the employment growth: Office with 60,718 more employees, Cultural/Institutional with 56,159, and Retail with 20,245, representing together more than 100 percent of the net total growth. Industrial was the only activity to lose employment over the period, shrinking from 140,353 to 120,282 with a peak of 167,172 employees in 1981. All activities but Cultural/

Institutional and Hotel showed three consecutive years of employment decline from 1989 to 1992.

Office has been the largest activity since 1982, accounting for almost one third of the total employment in 1992. From 1976 to 1990, Office activity increased from 27.9 percent to 34.1 percent of the total San Francisco employment. Then, it declined to 32.2 in 1992. The Industrial activity was larger than Office until 1981. From 1981 to 1992 it declined by more than 40,000 employees. In 1976 Industrial employment represented 35 percent of the total employment; this share was reduced to 22 percent in 1992. Government employment also showed a decline starting in 1981, with a minor increase from 1986 through 1989. Other activities show smaller increases after 1981 than before.

During the past sixteen years, Retail and Cultural/Institutional activities show an alternate pattern, where one activity grew while the other declined. In 1984 they had almost the same employment size. From 1984 to 1989 Cultural/Institutional employment increased at a faster pace than Retail. From 1989 to 1992, Retail employment declined to the size it had in 1983 while Cultural/

Graph 3.1.1

Government and Hotel activities are the smallest of all activities. In 1992, they represented 6.2 and 3.4 percent of the total employment respectively.

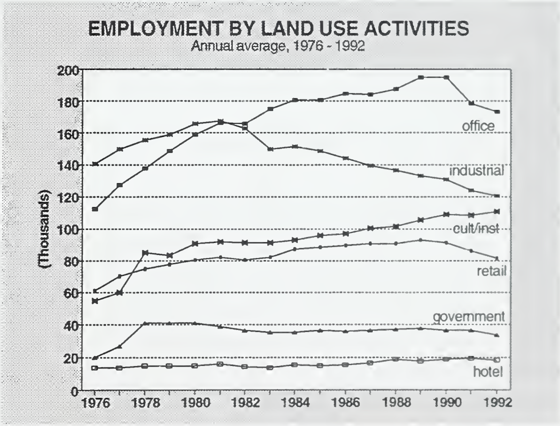


Table 3.1.1

EMPLOYMENT BY LAND USE ACTIVITIES
Annual Average
1976-1992

Land Use	Office	Retail	Industrial	Hotel	Cultural/ Institunl	Govermt	Other	Total
1976	111,966	60,933	140,353	13,346	54,286	19,398	711	400,994
1977	127,141	70,073	149,694	13,297	59,521	26,087	1,085	446,898
1978	137,366	74,534	155,211	14,175	84,727	40,658	1,583	508,255
1979	148,700	77,430	158,358	14,448	83,095	40,938	2,468	525,436
1980	158,479	80,255	165,463	14,504	90,205	40,620	2,316	551,842
1981	166,312	82,003	167,172	15,616	91,907	38,516	2,239	563,766
1982	165,327	80,554	162,631	13,904	91,329	36,476	1,399	551,620
1983	175,057	81,787	149,575	13,550	91,524	35,395	316	547,203
1984	180,217	86,934	151,075	15,038	92,632	35,415	844	562,156
1985	180,572	88,159	148,131	14,684	95,647	36,415	830	564,438
1986	184,227	89,815	143,992	14,935	96,866	35,592	1,369	566,795
1987	183,716	90,599	139,508	16,157	100,440	35,919	2,498	568,837
1988	187,339	90,370	136,229	18,304	101,432	36,584	1,276	571,533
1989	194,543	92,731	133,206	17,025	105,423	37,122	2,027	582,078
1990	194,534	91,278	130,690	18,457	108,558	36,348	1,694	581,559
1991	178,134	85,639	123,694	18,597	108,117	35,969	1,113	551,262
1992	172,684	81,178	120,282	18,165	110,445	33,225	1,007	536,986

EMPLOYMENT BY LAND USE ACTIVITIES
Percentage distribution by Land Use Activities
1976-1992

Land Use	Office	Retail	Industrial	Hotel	Cultural/ Institunl	Govermt	Other	Total
1976	27.9	15.2	35.0	3.3	13.5	4.8	0.2	100
1977	28.4	15.7	33.5	3.0	13.3	5.8	0.2	100
1978	27.0	14.7	30.5	2.8	16.7	8.0	0.3	100
1979	28.3	14.7	30.1	2.7	15.8	7.8	0.5	100
1980	28.7	14.5	30.0	2.6	16.3	7.4	0.4	100
1981	29.5	14.5	29.7	2.8	16.3	6.8	0.4	100
1982	30.0	14.6	29.5	2.5	16.6	6.6	0.3	100
1983	32.0	14.9	27.3	2.5	16.7	6.5	0.1	100
1984	32.1	15.5	26.9	2.7	16.5	6.3	0.2	100
1985	32.0	15.6	26.2	2.6	16.9	6.5	0.1	100
1986	32.5	15.8	25.4	2.6	17.1	6.3	0.2	100
1987	32.3	15.9	24.5	2.8	17.7	6.3	0.4	100
1988	32.8	15.8	23.8	3.2	17.7	6.4	0.2	100
1989	33.4	15.9	22.9	2.9	18.1	6.4	0.3	100
1990	33.5	15.7	22.5	3.2	18.7	6.3	0.3	100
1991	32.3	15.5	22.4	3.4	19.6	6.5	0.2	100
1992	32.2	15.1	22.4	3.4	20.6	6.2	0.2	100

EMPLOYMENT BY LAND USE ACTIVITIES
Annual percentage change
1976-199

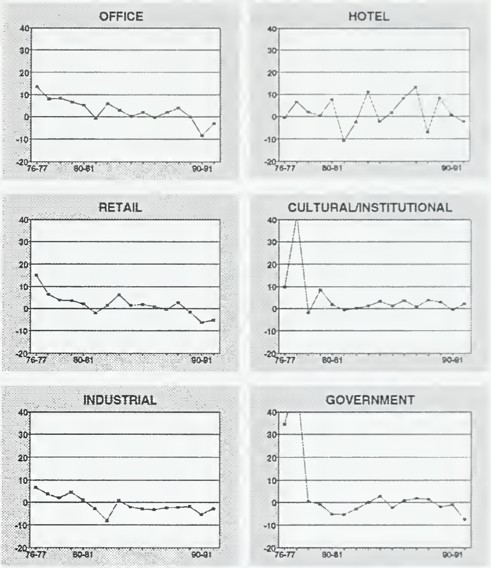
Land Use	Office	Retail	Industrial	Hotel	Cultural/ Institunl	Govermt	Other	Total
1976-77	13.6	15.0	6.7	-0.4	9.6	34.5	52.6	11.4
1977-78	8.0	6.4	3.7	6.6	42.3	55.9	45.9	13.7
1978-79	8.3	3.9	2.0	1.9	-1.9	0.7	55.9	3.4
1979-80	6.6	3.6	4.5	0.4	8.6	-0.8	-6.2	5.0
1980-81	4.9	2.2	1.0	7.7	1.9	-5.2	-3.3	2.2
1981-82	-0.6	-1.8	-2.7	-11.0	-0.6	-5.3	-37.5	-2.2
1982-83	5.9	1.5	-8.0	-2.6	0.2	-3.0	-77.4	-0.8
1983-84	2.9	6.3	1.0	11.0	1.2	0.1	167.3	2.7
1984-85	0.2	1.4	-1.9	-2.4	3.3	2.8	-1.7	0.4
1985-86	2.0	1.9	-2.8	1.7	1.3	-2.3	65.0	0.4
1986-87	-0.3	0.9	-3.1	8.2	3.7	0.9	82.4	0.4
1987-88	2.0	-0.3	-2.4	13.3	1.0	1.9	-48.9	0.5
1988-89	3.8	2.6	-2.2	-7.0	3.9	1.5	58.9	1.8
1989-90	-0.0	-1.6	-1.9	8.4	3.0	-2.1	-16.4	-0.1
1990-91	-8.4	-6.2	-5.4	0.8	-0.4	-1.0	-34.3	-5.2
1991-92	-3.1	-5.2	–2.8	-2.3	2.2	-7.6	-9.5	-2.6

Source: Department of City Planning
Employment Development Department

Graph 3.1.2 EMPLOYMENT BY LAND USE ACTIVITIES

Annual percentage change 1976-1992

Office activity showed less variations in its rate of change over time than other activities. (The greatest variation among percentage change indicators within Office activity is 5 percent.) Retail and Hotel activities have been volatile, with annual percentage change differences up to 20 percent. Retail and Cultural/Institutional rates showed some alternate patterns especially during 1980-84 and 1988-90, where Retail increased while Cultural/ Institutional decreased and vice versa. Over the last three years, most Activities showed negative rates with the exception of Cultural/Institutional activity. Since 1980, Cultural/ Institutional employment showed the most stable pace of growth.

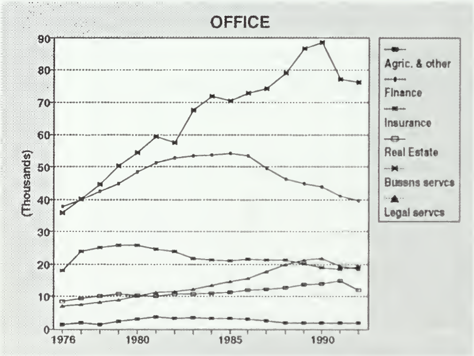


Institutional kept a moderate increase. By 1992, Cultural/Institutional activities had 110,445 employees, almost 30,000 more than Retail.

The San Francisco average rate of employment growth between 1976 and 1992 was 3.08 percent per year. During the late 1970s it was much higher than during the 1980s. From 1976 to 1980 the average growth rate was 8.4; during the 1980s it was 0.94 percent; and over the last three years it was -2.6 percent. The negative rate of growth for the past three years has increased from -0.1 in 1989-90 to -5.2 in 1990-91, and then it slowed down to -2.6 in 1991-92. Employment also declined from 1981 to 1983.

3.1.2 EMPLOYMENT BY INDUSTRY GROUP, 1976-1992

The following information describes employment groups within the larger catagories of Office, Retail, Cultural/Institutional, and Industrial. The data used come from the Employment Development Department's state office. As explained before, the employment decline showed in these graphs is affected by the changes in data collection procedures. While this is the same source as the previous table the formats are slightly different. The data used in these graphs are disaggregated to the two SIC digit level in order to identify the predominant groups and different growth trends within each Land Use Activity. The Industrial category has been divided into two different graphs to differentiate manufacturing from the other employment groups. Government and Hotel categories are not presented in this format since there was little new information added at the two digit level. At this level of detail health services, food manufacturing, food retail and transportation are the only employment groups that have shown some increase over the last three years. Most Cultural/Institutional employment groups, apparel and textile manufacturing, communication and public utilities, and department stores have had stable employment levels from 1989 to 1992.

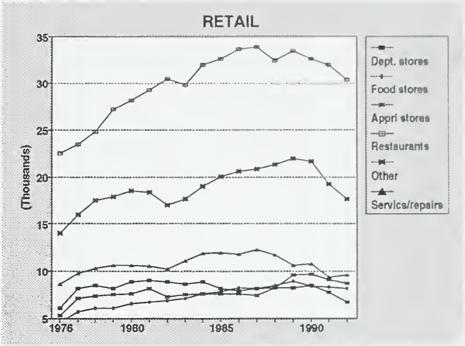


Graph 3.1.3

From 1976 to 1990, Business services showed a very significant employment increase. Personnel supply, services to buildings, and computer and data processing were the largest employment groups within business services. Engineering and architectural services, also part of business services, showed a significant growth. Business services, legal services, and real estate had an almost continuous employment growth until 1990. After 1990, almost all employment groups, with the exception of Insurance and agriculture, have declined. The finance and insurance industries decreased during the 1980s and 1990s while the real estate sector showed a small steady increase until 1991.

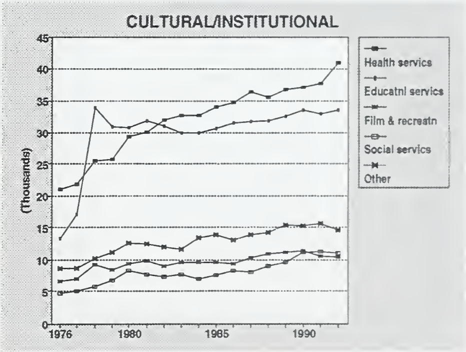
Graph 3.1.4

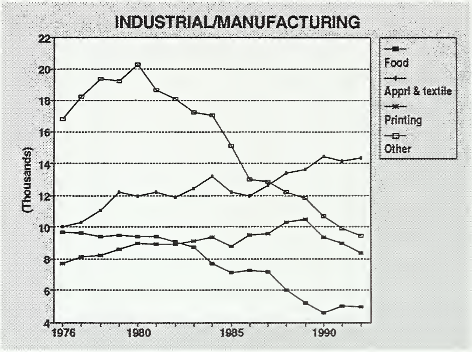
Most Retail employment groups showed a significant increase during the late 1970s, a moderate increase during the early 1980s, and a decline over the last four years. Restaurants, including all eating and drinking places, were the largest employment group. From 1976 to 1987, Restaurants showed a significant and almost constant growth. Since 1987, there was a significant decline. Other Retail included drug, liquor, book, building materials, garden supplies, furniture, homefurnishing stores. They represented a major percentage of the entire Retail classification which increased significantly until 1990. Food stores have also showed a large increase until 1989. Services and repairs includes personal services, auto repair, parking, and miscellaneous repair services.



Graph 3.1.5

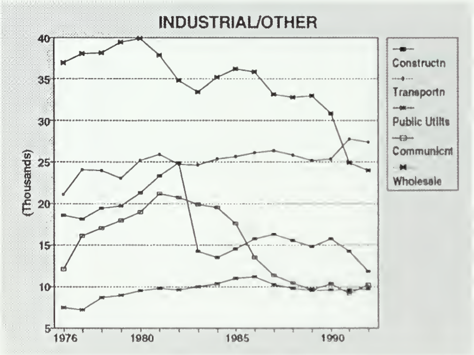
All Cultural/Institutional employment groups increased until 1990. After 1990, there has been no significant growth or decline with the exception of Health services which kept growing and was also the largest group. Educational services represented the second largest employment group. "Other" included museums and membership organizations.





Graph 3.1.6

This graph includes the employment groups within Industrial activity that are related to manufacturing. Among them, apparel manufacturing has become the largest group, showing an almost constant growth which accelerated since 1986. Food manufacturing showed a significant employment decline parallel to "Other" manufacturing (production of chemical goods, furniture, metals, transportation, etc.) except for the last three years when it shows some small increase.



Graph 3.1.7

From 1976 to 1992, there was a loss of employment in wholesale, construction, and communication. Transportation and Public Utilities are the only industries that grew over this period of time. From 1990 to 1992, there has been a drastic decline of wholesale and construction employment, while transportation continued to growth, and communication and public utilities remained stable

3.1.3 EMPLOYMENT DISTRIBUTION BY COMMERCE AND INDUSTRY DISTRICTS

As indicated before, the following figures describing employment distribution by Commerce and Industry Districts are based on estimates from establishment data prepared by County Business Patterns, US Department of Commerce. Table 3.1.2 presents data from 1981 to 1990, however, from 1982 to 1983 there was a change in data collection procedures that probably distorts the comparison for those years. Prior to 1983, the data included all establishments in business at the end of the year while in 1983 and after, they included all establishments in business any time during the year. Because these data rely on establishments classified by employment size ranges (i.e. each establishment within the range of 1 to 9 employees was assumed to have 5 employees), employment figures by Commerce and Industry Districts should be considered estimates and used only for order of magnitude comparisons. The Commerce and Industry Districts are defined in the Introduction, Data Formats section, page 6.

Table 3.1.2 shows percentage employment distribution over time. San Francisco employment was concentrated within the Financial and South of Market Districts, which together represented more

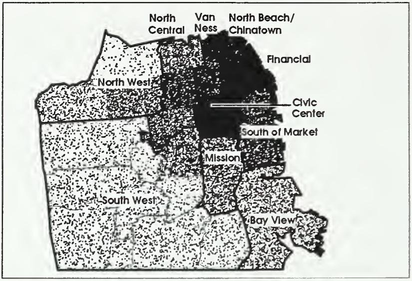
Table 3.1.2

EMPLOYMENT PERCENTAGE DISTRIBUTION BY DISTRICT AND YEAR
1981 - 1990

DISTRICT	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Bay View	2.5	3.9	2.9	3.5	3.3	3.5	3.5	3.9	3.8	3.8
Civic Center	6.2	8.4	9.1	7.6	7.0	7.0	6.9	6.9	6.4	6.2
Financial	38.9	32.9	37.7	40.1	39.5	38.5	39.5	39.2	39.5	36.4
Mission	2.7	3.1	2.6	2.6	2.6	2.5	2.9	2.6	2.7	2.8
North Beach/Chinat.	9.4	10.3	9.2	8.9	9.5	9.4	8.8	9.4	8.5	8.9
North Central	4.7	5.2	4.9	4.7	5.4	6.0	6.3	6.2	7.5	7.9
North West	3.9	4.5	3.7	3.4	3.1	3.4	4.0	3.2	3.6	3.7
SOMA	13.7	15.5	13.6	14.8	14.9	15.3	14.9	15.5	15.4	16.6
South West	6.3	7.2	6.7	6.7	6.8	6.3	6.4	6.5	6.2	6.6
Van Ness	3.8	4.1	4.1	3.2	3.6	3.5	3.7	3.6	3.5	3.7
Other	8.0	4.9	5.5	4.6	4.2	4.6	3.0	3.1	3.0	3.4
Total	100	100	100	100	100	100	100	100	100	100

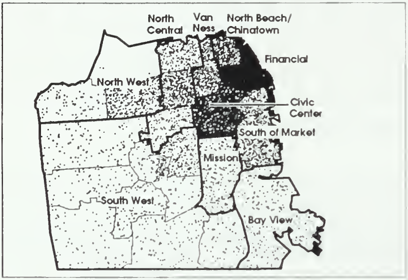
Source: County Business Patterns
Department of City Planning

MAP 3.1.1 EMPLOYMENT DISTRIBUTION BY C&I DISTRICTS 1990

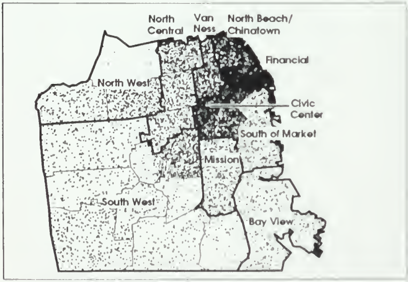


TOTAL

These maps are dot density maps to describe the relationship between number of employees and area. Each dot represents ten employees. However, the dots only indicate random distribution of employees within each zip code. They do not represent actual location of employment site.

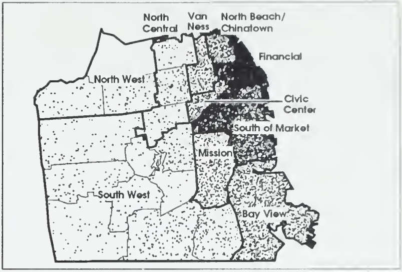


OFFICE

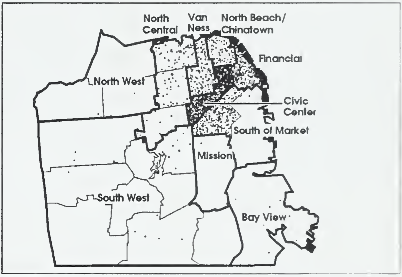


RETAIL

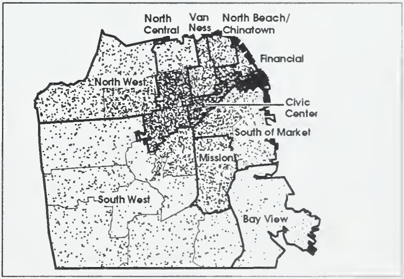
INDUSTRIAL



HOTEL



CULTURAL/ INSTITUTIONAL



Source: Department of City Planning
County Business Patterns

a decentralization of employment from the Financial District since 1984. The Financial District reduced its employment share from 40 percent in 1984 to 36 percent in 1990. North Central, South of Market, and Bay View Districts showed an increase of their employment share from 5, 14, and 3 percent in 1981 to 8, 17, and 4 percent, respectively in 1990. Districts with predominant Residential use, such as South West, North West, and Mission Districts, did not indicate significant changes over time.

Table 3.1.3 shows that Office employment is concentrated in the Financial District (63 percent). To a lesser degree, Industrial activities are also concentrated in the Financial and South of Market Districts. Hotel activity shows a concentrated employment distribution of more than 58 percent between Civic Center and North Beach/ Chinatown Districts (which includes Fisherman's Wharf). Retail and Cultural/Institutional activities show a more decentralized distribution of employment than other activities, with well below 20 percent in any one district except North Central which held 27 percent of Cultural/Institutional.

Table 3.1.3

EMPLOYMENT DISTRIBUTION BY C&I DISTRICT AND LAND USE ACTIVITY 1990

DISTRICT	OFFICE	RETAIL	INDUST	HOTEL	CULTRL/ INSTNL	TOTAL
Bay View	1.4	2 9	11.0	0 4	1 2	4 0
Civic Center	4.5	9.9	1.7	29 9	7 9	6 4
Financial	63.2	15.5	36.5	13 6	14 3	37 7
Mission	0.7	3.9	3 5	0 1	6 4	2 9
North Beach/Chinatwn	7.0	15.4	6 6	27.9	6.3	9 2
North Central	3.0	11.8	1.6	5 2	27 2	8 2
North West	1 5	5.9	0 8	0 3	12 8	3 9
SOMA	13.4	15 1	31.7	14 2	6 9	17 2
South West	3.2	13 5	4 6	0 9	11 9	6 8
Van Ness	2 2	6.2	1 8	7 4	5.2	3 9
Other	1.7	2.2	8 7	2 3	1 9	3 5
Total	100	100	100	100	100	100

Source: Department of City Planning
County Business Patterns

3.1.3 EMPLOYMENT DISTRIBUTION BY ESTABLISHMENT SIZE

As explained in section 3.1.2, employment data by establishments size are estimated from establishments data provided by County Business Patterns, 1990. Table 3.1.4 shows the percentage distribution of employment by establishment size within each Commerce and Industry District. Based on the same data, Graph 3.1.8 shows the employment distribution by Commerce and Industry Districts within each size class. There are four size classes, based on the number of employees per establishment.

Districts with a high percentage of their total employment within the smallest establishments classification (1-19) are Districts that have a major residential component such as Van Ness, Mission, and North West. The Financial, Civic Center, and South of Market Districts, which have a very small residential component and a large percent of Office activity, are districts with the smallest percentage of their total employment in small establishments. Within the second classification, 20 to 99 employees per establishment, districts with significant Retail and Industrial activities tend to show the highest employment percentages. The Financial and Bay View Districts

Table 3.1.4

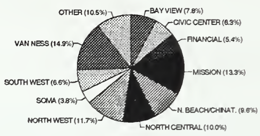
EMPLOYMENT BY C&I DISTRICT AND ESTABLISHMENTS SIZE CLASS
Percentage distribution by size class
1990

	Establishment size class				
DISTRICT	1-19	20-99	100-499	500+	TOTAL
Bay View	25.7	38.2	32.8	3.4	100
Civic Center	20.6	25.3	29.8	24.3	100
Financial	17.9	30.2	32.5	19.5	100
Mission	43.7	29.3	11.2	15.9	100
North Beach/Chinatwn	31.6	30.8	25.3	12.2	100
North Central	32.7	24.7	13.6	29.0	100
North West	38.3	20.4	16.4	24.9	100
SOMA	12.6	15.4	29.8	42.2	100
South West	21.8	34.5	23.9	19.8	100
Van Ness	49.1	27.5	21.4	2.0	100
Other	34.6	32.3	24.9	8.3	100
Total	25.4	29.5	26.5	18.6	100

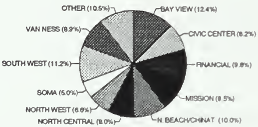
Source: Department of City Planning
County Business Patterns

have the greatest percentage of their employment within the size class from 100 to 499 employees. Civic Center, North Central, North West, and South of Market, Districts that house many Cultural/ Institutional activities, have a relatively high employment allocations within large establishments size class of more than 500 employees.

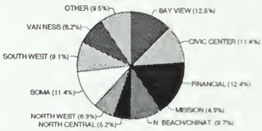
EMPLOYMENT: ESTABLISHMENT SIZE 1-19



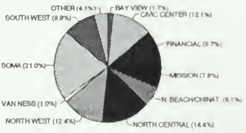
EMPLOYMENT: ESTABLISHMENT SIZE 20-99



EMPLOYMENT: ESTABLISHMENT SIZE 100-499



EMPLOYMENT: ESTABLISHMENT SIZE 500+



Graph 3.1.8

EMPLOYMENT DISTRIBUTION BY C&I DISTRICTS BY ESTABLISHMENT SIZE CLASS

Employment within medium size establishments (20 to 499 employees) are more evenly distributed among all districts than small and large establishments.

While Civic Center and South of Market Districts increased their employment share as the establishment size increased. Van Ness showed a reverse pattern having a large employment share within small establishments and a small share within large establishments.

Van Ness had the largest employment share within small establishments and South of Market had the largest share within large establishments

3.2 ESTABLISHMENTS

The description of San Francisco business establishments in this year's report include data from 1981 to 1990. These data, provided by County Business Patterns (CBP) change their format from 1982 to 1983 which may have resulted in an additional increase of the number of establishments for the city. The data are classified by zip code and Industry Group. As explained before, this data source is the only one available by two, three and four-digit SIC. The 1990 data are the last available information disaggregated by zip code.

The County Business Patterns defines establishment as "a single physical location at which business is conducted or where services or industrial operations are performed". This is different from a company or enterprise which may consist of several establishments. Establishments are classified within specific industry groups based on their predominant activity. County Business Patterns excludes information that may disclose the operations of an individual employer.

The information is classified by Commerce and Industry Districts and Land Use Activities, which are the data formats defined for this Inventory. These formats are described in detail within the Introduction, Data formats section, page 3. First, the establishment data are presented over time from 1981 to 1990 by Land Use Activity and Commerce and Industry District. The second part of the establishment data focus on 1990. In addition to the establishments classification by the six Land Use activities, each activity is disaggregated into small industry groups to the two SIC digit level. The establishment data presented by Commerce and Industry Districts are disaggregated by zip code. Data are also presented by establishment size. Finally, data on nonprofit organizations are included.

Table 3.2.2 shows the distribution of establishments by Land Use Activities from 1981 to 1990. Over these ten years, there has been an increase of 6,700 establishments, or almost 26 percent. The

ESTABLISHMENT DISTRIBUTION OF C&I DISTRICTS BY YEAR

Table 3.2.1

Year	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Bay View	805	845	965	962	1,010	1,004	1,125	1,182	1,203	1,129
Civic Center	1,667	1,623	1,950	1,976	1,928	2,003	1,910	1,849	1,794	1,705
Financial	6,348	5,306	6,174	7,073	7,591	8,583	8,765	8,725	11,672	8,290
Mission	1,172	1,124	1,284	1,309	1,345	1,360	1,403	1,427	1,434	1,473
North Beach	3,181	2,991	3,491	3,470	3,473	3,466	3,598	3,613	1,629	3,545
N. Central	2,058	1,975	2,379	2,402	2,488	2,565	2,556	2,590	3,347	3,366
North West	1,594	1,485	1,766	1,815	1,896	1,933	1,849	1,848	1,829	1,839
SOMA	3,174	3,117	3,459	3,782	3,946	4,136	4,157	4,159	4,407	4,491
South West	3,402	3,114	3,762	3,795	4,156	4,029	4,047	4,199	4,204	4,280
Van Ness	1,555	1,509	1,726	1,679	1,763	1,709	1,704	1,698	1,721	1,661
Other	686	428	748	642	605	636	487	499	505	559
Total	25,642	23,517	27,704	28,905	30,201	31,424	31,601	31,789	33,745	32,338

Percentage distribution of establishments by C&I District

YEAR	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Bay View	3.14	3.59	3.48	3.33	3.34	3.20	3.56	3.72	3.56	3.49
Civic Center	6.50	6.90	7.04	6.84	6.38	6.37	6.04	5.82	5.32	5.27
Financial	24.76	22.56	22.29	24.47	25.13	27.31	27.74	27.45	34.59	25.64
Mission	4.57	4.78	4.63	4.53	4.45	4.33	4.44	4.49	4.25	4.56
North Beach	12.41	12.72	12.60	12.00	11.50	11.03	11.39	11.37	4.83	10.96
N. Central	8.03	8.40	8.59	8.31	8.24	8.16	8.09	8.15	9.92	10.41
North West	6.22	6.31	6.37	6.28	6.28	6.15	5.85	5.81	5.42	5.69
SOMA	12.38	13.25	12.49	13.08	13.07	13.16	13.15	13.08	13.06	13.89
South West	13.27	13.24	13.58	13.13	13.76	12.82	12.81	13.21	12.46	13.24
Van Ness	6.06	6.42	6.23	5.81	5.84	5.44	5.39	5.34	5.10	5.14
Other	2.68	1.82	2.70	2.22	2.00	2.02	1.54	1.57	1.50	1.73
Total	100	100	100	100	100	100	100	100	100	100

Annual percentage change by C&I District

YEAR	81-82	82-83	83-84	84-85	85-86	86-87	87-88	88-89	89-90	81-90
Bay View	4.97	14.20	-0.31	4.99	-0.59	12.05	5.07	1.78	-6.15	4.5
Civic Center	-2.64	20.15	1.33	-2.43	3.89	-4.64	-3.19	-2.97	-4.96	0.3
Financial	-16.41	16.36	14.56	7.32	13.07	2.12	-0.46	33.78	-28.98	3.4
Mission	-4.10	14.23	1.95	2.75	1.12	3.16	1.71	0.49	2.72	2.9
North Beach	-5.97	16.72	-0.60	0.09	-0.20	3.81	0.42	-54.91	117.62	1.3
N. Central	-4.03	20.46	0.97	3.58	3.09	-0.35	1.33	29.23	0.57	7.1
North West	-6.84	18.92	2.77	4.46	1.95	-4.35	-0.05	-1.03	0.55	1.7
SOMA	-1.80	10.97	9.34	4.34	4.82	0.51	0.05	5.96	1.91	4.6
South West	-8.47	20.81	0.88	9.51	-3.06	0.45	3.76	0.12	1.81	2.9
Van Ness	-2.96	14.38	-2.72	5.00	-3.06	-0.29	-0.35	1.35	-3.49	0.8
Other	-37.61	74.77	-14.17	-5.76	5.12	-23.43	2.46	1.20	10.69	-2.0
Total	-8.29	17.80	4.34	4.48	4.05	0.56	0.59	6.15	-4.17	2.9

Source: Department of City Planning
County Business Patterns, 1990

growth in the number of establishments was greater during the early 1980s than during the late 1980s. From 1981 to 1986, the annual average growth in the number of establishments was 4.5 percent while from 1986 to 1990 the average growth was 0.7 percent. From 1989 to 1990, there was a decrease of 4 percent in the number of establishments.

Office establishments showed the greatest increase among all Land Use activities. Over the ten year period, they increased by more than 4,000 establishments which represented an increase of 60 percent. Retail and Cultural/Institutional establishments presented the second largest growth of establishments of 25 percent each. From 1980 to 1990, Retail increased by more than 1,700 establishments and Cultural/Institutional increased by almost 1,000. Hotel and Industrial establishments had the smallest increases of 20 and 15 percent respectively. Hotel increased by 58 establishments and Industrial by 614.

Table 3.2.2

ESTABLISHMENT BY LAND USE ACTIVITIES
1981-1990

Year	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Office	6,958	6,355	7,552	7,859	8,144	9,094	9,655	10,194	11,094	11,170
Retail	6,945	7,029	7,586	7,747	7,868	8,085	8,548	8,250	8,782	8,681
Indust	5,354	4,709	5,147	5,433	5,646	5,735	6,065	5,833	6,003	5,968
Hotel	274	276	301	315	306	332	314	305	323	332
Cult/Ins	3,802	3,825	4,146	4,252	4,318	4,382	4,495	4,501	4,761	4,736
Unclass	2,309	1,323	2,972	3,299	3,919	3,796	2,524	2,706	2,782	1,451
Total	25,642	23,517	27,704	28,905	30,201	31,424	31,601	31,789	33,745	32,338

Percentage distribution of establishments by Land Use

Year	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Office	27.14	27.02	27.26	27.19	26.97	28.94	30.55	32.07	32.88	34.54
Retail	27.08	29.89	27.38	26.80	26.05	25.73	27.05	25.95	26.02	26.84
Indust	20.88	20.02	18.58	18.80	18.69	18.25	19.19	18.35	17.79	18.46
Hotel	1.07	1.17	1.09	1.09	1.01	1.06	0.99	0.96	0.96	1.03
Cult/Ins	14.83	16.26	14.97	14.71	14.30	13.94	14.22	14.16	14.11	14.65
Unclass	9.00	5.63	10.73	11.41	12.98	12.08	7.99	8.51	8.24	4.49
Total	100	100	100	100	100	100	100	100	100	100

Annual percentage change of establishments by Land Use

Year	1981-82	82-83	83-84	84-85	85-86	86-87	87-88	88-89	89-90	81-90
Office	-8.67	18.84	4.07	3.63	11.67	6.17	5.58	8.83	0.69	6.7
Retail	1.21	7.92	2.12	1.56	2.76	5.73	-3.49	6.45	-1.15	2.7
Indust	-12.05	9.30	5.56	3.92	1.58	5.75	-3.83	2.91	-0.58	1.3
Hotel	0.73	9.06	4.65	-2.86	8.50	-5.42	-2.87	5.90	2.79	2.4
Cult/Ins	0.60	8.39	2.56	1.55	1.48	2.58	0.13	5.78	-0.53	2.7
Unclass	-42.70	124.64	11.00	18.79	-3.14	-33.51	7.21	2.81	-47.84	-4.1
Total	-8.29	17.80	4.34	4.48	4.05	0.56	0.59	6.15	-4.17	2.9

Source: Department of City Planning
County Business Patterns, 1990

The number of Office establishments increased its share citywide, from 27 percent of all establishments in 1981 to 35 percent in 1990. All the other Land Use Activities showed some decline in their shares. Industrial establishments showed the greatest decline in their citywide share of more than 2 percent.

3.2.1 ESTABLISHMENTS DISTRIBUTION BY LAND USE ACTIVITY AND COMMERCE AND INDUSTRY DISTRICTS

As indicated in Table 3.2.3, in 1990, Office activity accounted for the largest number of establishments (35 percent) in the city. Retail activity with 27 percent and Industrial activity with 18 percent were the second and third largest activities in the city.

While Office establishments are highly concentrated in the Financial District (48 percent), Retail and Cultural/Institutional establishments are more dispersed throughout South of Market, North West, North Central, South West, and Financial Districts. Industrial and Hotel establishments tend to be concentrated in a few Districts. Industrial establishments are concentrated in South of Market, Financial, and South West Districts; and Hotel establishments in North Beach/ Chinatown, North Central and Civic Center.

The Financial District contains more than 25 percent of the total number of establishments, followed by South of Market and South West with 14 and 13 percent respectively. Two Commerce and Industry Districts in San Francisco are very specialized, having more than 50 percent of its establishments in one activity. Bay View District shows 61 percent of its establishments as Industrial and the Financial District 65 percent as Office. Other Districts, such as Mission and South West, show a more diverse set of activities with no single activity dominating.

Table 3.2.3

ESTABLISHMENTS BY COMMERCE AND INDUSTRY DISTRICTS AND LAND USE ACTIVITIES
Number of Establishments
1990

District	Office	Retail	Indust	Hotel	Cult/Ins	Unclass	Total
Bay View	123	212	692	6	60	36	1,129
Civic Center	519	536	167	53	362	68	1,705
Financial	5,369	993	1,106	40	487	295	8,290
Mission	193	519	337	8	330	86	1,473
N. Beach/Chinatwn	1,041	1,334	482	46	491	151	3,545
North Central	741	1,207	294	66	882	176	3,366
North West	384	616	204	6	534	95	1,839
SOMA	1,252	1,029	1,619	33	374	184	4,491
South West	922	1,464	754	24	861	255	4,280
Van Ness	487	604	155	44	295	76	1,661
Other	139	167	158	6	60	29	559
Total	11,170	8,681	5,968	332	4,736	1,451	32,338

Percentage distribution of establishments by Commerce and Industry Districts

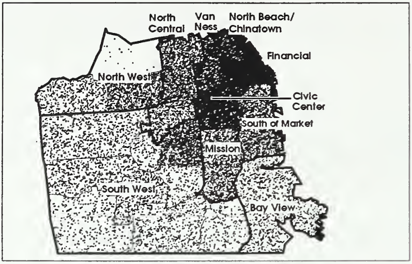
District	Office	Retail	Indust	Hotel	Cult/Ins	Unclass	Total
Bay View	1.10	2.44	11.60	1.81	1.27	2.48	3.49
Civic Center	4.65	6.17	2.80	15.96	7.64	4.69	5.27
Financial	48.07	11.44	18.53	12.05	10.28	20.33	25.64
Mission	1.73	5.98	5.65	2.41	6.97	5.93	4.56
N. Beach/Chinatwn	9.32	15.37	8.08	13.86	10.37	10.41	10.96
North Central	6.63	13.90	4.93	19.88	18.62	12.13	10.41
North West	3.44	7.10	3.42	1.81	11.28	6.55	5.69
SOMA	11.21	11.85	27.13	9.94	7.90	12.68	13.89
South West	8.25	16.86	12.63	7.23	18.18	17.57	13.24
Van Ness	4.36	6.96	2.60	13.25	6.23	5.24	5.14
Other	1.24	1.92	2.65	1.81	1.27	2.00	1.73
Total	100	100	100	100	100	100	100

Percentage distribution of establishments by Land Use Activities

District	Office	Retail	Indust	Hotel	Cult/Ins	Unclass	Total
Bay View	10.89	18.78	61.29	0.53	5.31	3.19	100
Civic Center	30.44	31.44	9.79	3.11	21.23	3.99	100
Financial	64.76	11.98	13.34	0.48	5.87	3.56	100
Mission	13.10	35.23	22.88	0.54	22.40	5.84	100
N. Beach/Chinatwn	29.37	37.63	13.60	1.30	13.85	4.26	100
North Central	22.01	35.86	8.73	1.96	26.20	5.23	100
North West	20.88	33.50	11.09	0.33	29.04	5.17	100
SOMA	27.88	22.91	36.05	0.73	8.33	4.10	100
South West	21.54	34.21	17.62	0.56	20.12	5.96	100
Van Ness	29.32	36.36	9.33	2.65	17.76	4.58	100
Other	24.87	29.87	28.26	1.07	10.73	5.19	100
Total	34.54	26.84	18.46	1.03	14.65	4.49	100

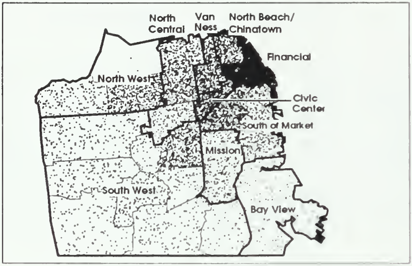
Source: Department of City Planning
County Business Patterns, 1990

MAPS 3.2.1 ESTABLISHMENTS DISTRIBUTION BY C&I DISTRICTS 1990

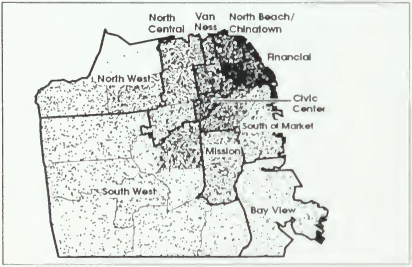


TOTAL

These maps are dot density maps describing the relationships between number of establishments and area. However, the dots only indicate random distribution of establishments within each zip code. They do not represent actual location of establishments.

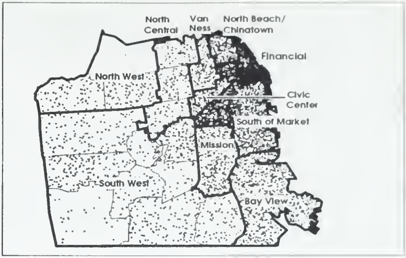


OFFICE

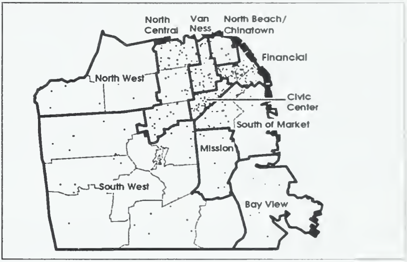


RETAIL

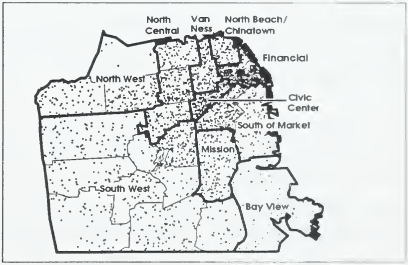
INDUSTRIAL



HOTEL



CULTURAL/INSTITUTIONAL



Source: Department of City Planning
County Business Patterns

3.2.2 ESTABLISHMENTS DISTRIBUTION BY SIC CODES AND COMMERCE AND INDUSTRY DISTRICTS

In addition to the establishment data presented by Land Use activities, Tables 3.2.4 to 3.2.7 show a detailed breakdown of industry groups (two-digit SIC) included within each of those activities. Hotel and Government activities are not included in this series of tables because Hotel represents only one industry group (70) and Government data are not reported by the CBP establishments data.

The largest industry groups in Office activity were finance, insurance, and real estate (F.I.R.E.); business services; legal services; and architecture and engineering. Together they constituted over 90 percent of all Office establishments. The Financial District contained the majority of all legal services (63 percent) and F.I.R.E. (53 percent) establishments. Business, architecture and engineering services have a substantial representation in, the Financial District, South of Market and North Beach/Chinatown Districts.

Table 3.2.5 shows Eating and Drinking establishments (SIC 58) as the largest industry group within Retail activity. They were mainly located in North Beach/Chinatown, North Central, South West, and the Financial Districts. The second largest industry group was miscellaneous Retail, with its highest concentrations in North Beach/Chinatown, North Central, South of Market, and South West. Food stores were the third largest category of retail establishments.

In most Districts, eating and drinking establishments represented more than 25 percent of their Retail establishments. Thirty-six percent of the Financial and Civic Center, and 35 percent of the North Central retail establishments were restaurants. North Beach/Chinatown showed the highest number of restaurants, (394) and South West the highest number of food stores (190) among all districts. Personal services establishments were mainly concentrated in the South West, North Central, and North Beach/Chinatown Districts.

Table 3.2.6 shows the concentration of 67 percent of Industrial establishments in construction and wholesale. Printing and publishing, and apparel manufacturing industries account for more than 400 establishments each, or 8 percent of all Industrial establishments. Most Industrial establishments are located in South of Market, which contains more than 27 percent of total establishments. Bay View District, which has limited participation in other activities, shows the third largest concentration of Industrial establishments. They are mainly related to wholesale and construction. South West District contains the largest number of construction establishments (440), citywide, which represent 73 percent of the total industrial establishments within this District.

More than 50 percent of all Cultural/Institutional establishments are within health services. They are mainly located in the North Central, South West, and North West Districts. Membership organizations and social services establishments are the second and third largest groups with 17 and 14 percent of all Cultural/Institutional establishments. Educational establishments represent 6 percent. The three remaining groups, motion picture, amusement and recreation, and museums, make up the remaining 10 percent of the total.

OFFICE ESTABLISHMENTS BY C&I DISTRICTS AND MAIN INDUSTRY GROUPS (SIC)
1990

Table 3.2.4

District	0-14	47	60-67	73	81	87	Total
Bay View	4	11	25	64	1	18	123
Civic Center	2	45	162	93	134	83	519
Financial	32	147	2,466	882	999	741	5,267
Mission	10	7	70	66	21	19	193
N. Beach/Chinatwn	8	89	363	204	175	195	1,034
North Central	25	32	288	162	71	107	685
North West	11	13	188	82	9	61	364
SOMA	13	40	491	372	60	220	1,196
South West	45	21	354	147	44	98	709
Van Ness	5	19	213	96	71	83	487
Other	2	13	43	22	1	10	91
Total	157	437	4,663	2,190	1,586	1,635	10,668

Percentage distribution of establishments by C&I Districts

District	0-14	47	60-67	73	81	87	Total
Bay View	2.55	2.52	0.54	2.92	0.06	1.10	1.15
Civic Center	1.27	10.30	3.47	4.25	8.45	5.08	4.87
Financial	20.38	33.64	52.88	40.27	62.99	45.32	49.37
Mission	6.37	1.60	1.50	3.01	1.32	1.16	1.81
N. Beach/Chinatwn	5.10	20.37	7.78	9.32	11.03	11.93	9.69
North Central	15.92	7.32	6.18	7.40	4.48	6.54	6.42
North West	7.01	2.97	4.03	3.74	0.57	3.73	3.41
SOMA	8.28	9.15	10.53	16.99	3.78	13.46	11.21
South West	28.66	4.81	7.59	6.71	2.77	5.99	6.65
Van Ness	3.18	4.35	4.57	4.38	4.48	5.08	4.57
Other	1.27	2.97	0.92	1.00	0.06	0.61	0.85
Total	100	100	100	100	100	100	100

Percentage distribution of establishment by Industry Groups (SIC)

District	0-14	47	60-67	73	81	87	Total
Bay View	3.25	8.94	20.33	52.03	0.81	14.63	100
Civic Center	0.39	8.67	31.21	17.92	25.82	15.99	100
Financial	0.81	2.79	48.82	18.75	18.97	14.07	100
Mission	5.18	3.63	36.27	34.20	10.88	9.84	100
N. Beach/Chinatwn	0.77	8.61	35.11	19.73	16.92	18.86	100
North Central	3.65	4.67	42.04	23.65	10.36	15.62	100
North West	3.02	3.57	51.65	22.53	2.47	16.76	100
SOMA	1.09	3.34	41.05	31.10	5.02	18.39	100
South West	6.35	2.96	49.93	20.73	6.21	13.82	100
Van Ness	1.03	3.90	43.74	19.71	14.58	17.04	100
Other	2.20	14.29	47.25	24.18	1.10	10.99	100
Total	1.47	4.10	43.71	20.53	14.87	15.33	100

Source: Department of City Planning
County Business Patterns, 1990

INDUSTRY GROUPS, SIC

0-14: Agriculture, forestry, fishing and mining.
47: Transportation services
60-7: Finance, Insurance, and Real Estate
73: Business Services
81: Legal Services
87: Engineering and Architectural Services

Table 3.2.5

RETAIL ESTABLISHMENTS BY C&I DISTRICTS AND MAIN INDUSTRY GROUPS (SIC)
1990

District	52	53	54	55	56	57	58	59	72	75	76	Total
Bay View	12	3	26	13	2	21	35	40	11	29	20	212
Civic Center	1	4	40	9	38	21	191	128	53	44	7	536
Financial	16	8	92	25	85	51	333	160	72	64	14	920
Mission	11	5	69	17	47	27	148	77	55	42	21	519
N. Beach/Chinatwn	4	14	166	8	173	40	394	362	108	44	8	1,321
North Central	19	10	102	26	94	49	377	255	118	32	10	1,090
North West	11	4	77	29	38	46	208	99	70	15	7	604
SOMA	20	10	61	38	109	74	262	195	82	129	41	1,001
South West	17	7	190	68	82	49	416	179	151	48	22	1,227
Van Ness	5	3	62	18	39	39	202	105	52	71	7	603
Other	1	2	5	5	12	3	58	35	8	8	3	138
Total	117	70	890	256	719	420	2,624	1,635	756	524	160	8,171

Percentage distribution of establishments by C&I Districts

District	52	53	54	55	56	57	58	59	72	75	78	Total
Bay View	10.26	4.29	2.92	5.08	0.28	5.00	1.33	2.45	1.46	5.53	12.50	2.59
Civic Center	0.85	5.71	4.49	3.52	5.29	5.00	7.28	7.83	7.01	8.40	4.38	8 56
Financial	13.68	11.43	10.34	9.77	11.82	12.14	12.69	9.79	9.52	12.21	8.75	11.28
Mission	9.40	7.14	7.75	6.64	6.54	6.43	5.64	4.71	7.28	8.02	13.13	8.35
N. Beach/Chinatwn	3.42	20.00	18.65	3.13	24.06	9.52	15.02	22.14	14.29	8.40	5.00	18.17
North Central	16.24	14.29	11.46	10.16	13.07	11.67	14.37	15.60	15.34	8.11	8.25	13.34
North West	9.40	5.71	8.65	11.33	5.29	10.95	7.93	6.06	9.26	2.86	4.38	7.39
SOMA	17.09	14.29	6.85	14.84	15.16	17.62	9.98	11.93	8.20	24.62	25.63	12.25
South West	14.53	10.00	21.35	26.56	11.40	11.67	15.85	10.95	19.97	8.78	13.75	15.02
Van Ness	4.27	4.29	6.97	7.03	5.42	9.29	7.70	6.42	6.88	13.55	4.38	7.38
Other	0.85	2.86	0.56	1.95	1.67	0.71	2.21	2.14	0.79	1.53	1.88	1.69
Total	100	100	100	100	100	100	100	100	100	100	100	100

Percentage distribution of establishments by Main Industry Groups (SIC)

District	52	53	54	55	56	57	58	59	72	75	76	Total
Bay View	5.66	1.42	12.26	6.13	0.94	9.91	16.51	18.87	5.19	13.68	9.43	100
Civic Center	0.19	0.75	7.46	1.68	7.09	3.92	35.63	23.88	9.89	8.21	1.31	100
Financial	1.74	0.87	10.00	2.72	9.24	5.54	36.20	17.39	7.83	6.96	1.52	100
Mission	2.12	0.96	13.29	3.28	9.06	5.20	28.52	14.84	10.60	8.09	4.05	100
N. Beach/Chinatwn	0.30	1.06	12.57	0.61	13.10	3.03	29.83	27.40	8.18	3.33	0.61	100
North Central	1.74	0.92	9.36	2.39	8.62	4.50	34.59	23.39	10.64	2.94	0.92	100
North West	1.82	0.66	12.75	4.80	6.29	7.62	34.44	16.39	11.59	2.48	1.16	100
SOMA	2.00	1.00	6.09	3.80	10.89	7.39	26.17	19.48	6.19	12.89	4.10	100
South West	1.39	0.57	15.48	5.54	6.68	3.99	33.90	14.59	12.31	3.75	1.79	100
Van Ness	0.83	0.50	10.28	2.99	6.47	6.47	33.50	17.41	8.62	11.77	1.16	100
Other	0.72	1.45	3.62	3.62	8.70	2.17	42.03	25.36	4.35	5.80	2.17	100
Total	1.43	0.86	10.89	3.13	8.80	5.14	32.11	20.01	9.25	6.41	1.96	100

Source: Department of City Planning
County Business Patterns,1990

INDUSTRY GROUPS, SIC

52: Building materials and garden supplies
53: General merchandise stores
54: Food stores
55: Auto dealers, service stations
56: Apparel and accesory stores
57: Furniture and homefurnishing stores
58: Eating and drinking places
59: Miscellaneous retail
72: Personal services
75: Auto repair, services, & parking
76: Miscellaneous services

Table 3.2.6

INDUSTRIAL ESTABLISHMENTS BY C&I DISTRICTS AND MAIN INDUSTRY GROUPS
1990

District	15-7	20	23	27	39+	41-5	48	49	50	51	Total
Bay View	191	31	5	31	8	68	3	4	126	123	590
Civic Center	18	3	11	14	10	13	4	5	60	24	162
Financial	123	11	25	110	42	78	62	22	247	187	907
Mission	142	7	38	14	14	17	6	0	38	33	309
N. Beach/Chinatwn	55	14	131	37	22	23	13	7	69	83	454
North Central	125	1	4	28	7	13	4	1	27	34	244
North West	119	2	1	12	1	10	2	0	22	25	194
SOMA	197	19	179	150	28	89	21	15	430	296	1,424
South West	440	5	11	14	7	14	4	5	55	41	596
Van Ness	42	7	24	12	1	7	4	1	28	21	147
Other	13	7	5	8	2	54	2	4	13	20	128
Total	1,465	107	434	430	142	386	125	64	1,115	887	5,155

Percentage distribution of establishments by C&I Districts

District	15-7	20	23	27	39+	41-5	48	49	50	51	Total
Bay View	13.04	28.97	1.15	7.21	5.63	17.62	2.40	6.25	11.30	13.87	11.45
Civic Center	1.23	2.80	2.53	3.26	7.04	3.37	3.20	7.81	5.38	2.71	3.14
Financial	8.40	10.28	5.76	25.58	29.58	20.21	49.60	34.38	22.15	21.08	17.59
Mission	9.69	6.54	8.76	3.26	9.86	4.40	4.80	0.00	3.41	3.72	5.99
N. Beach/Chinatwn	3.75	13.08	30.18	8.60	15.49	5.96	10.40	10.94	6.19	9.36	8.81
North Central	8.53	0.93	0.92	6.51	4.93	3.37	3.20	1.56	2.42	3.83	4.73
North West	8.12	1.87	0.23	2.79	0.70	2.59	1.60	0.00	1.97	2.82	3.76
SOMA	13.45	17.76	41.24	34.88	19.72	23.06	16.80	23.44	38.57	33.37	27.62
South West	30.03	4.67	2.53	3.26	4.93	3.63	3.20	7.81	4.93	4.62	11.56
Van Ness	2.87	6.54	5.53	2.79	0.70	1.81	3.20	1.56	2.51	2.37	2.85
Other	0.89	6.54	1.15	1.86	1.41	13.99	1.60	6.25	1.17	2.25	2.48
Total	100	100	100	100	100	100	100	100	100	100	100

Percentage distribution of establishments by Main Industry Groups (SIC)

District	15-7	20	23	27	39+	41-5	48	49	50	51	Total
Bay View	32.37	5.25	0.85	5.25	1.36	11.53	0.51	0.68	21.36	20.85	100
Civic Center	11.11	1.85	6.79	8.64	6.17	8.02	2.47	3.09	37.04	14.81	100
Financial	13.56	1.21	2.76	12.13	4.63	8.60	6.84	2.43	27.23	20.62	100
Mission	45.95	2.27	12.30	4.53	4.53	5.50	1.94	0.00	12.30	10.68	100
N. Beach/Chinatwn	12.11	3.08	28.85	8.15	4.85	5.07	2.86	1.54	15.20	18.28	100
North Central	51.23	0.41	1.64	11.48	2.87	5.33	1.64	0.41	11.07	13.93	100
North West	61.34	1.03	0.52	6.19	0.52	5.15	1.03	0.00	11.34	12.89	100
SOMA	13.83	1.33	12.57	10.53	1.97	6.25	1.47	1.05	30.20	20.79	100
South West	73.83	0.84	1.85	2.35	1.17	2.35	0.67	0.84	9.23	6.88	100
Van Ness	28.57	4.76	16.33	8.16	0.68	4.76	2.72	0.68	19.05	14.29	100
Other	10.16	5.47	3.91	6.25	1.56	42.19	1.56	3.13	10.16	15.63	100
Total	28.42	2.08	8.42	8.34	2.75	7.49	2.42	1.24	21.63	17.21	100

Source: Department of City Planning
County Business Patterns, 1990

INDUSTRY GROUPS, SIC

15-7: Construction

20: Food and kindred products

23: Apparel & other textile products

27: Printing and publishing

39+: Other manufacturing

41-5: Transportation

48: Communications

49: Electric, gas, & sanitary services

50: Wholesale, durable goods

51: Wholesale, nondurable goods

Table 3.2.7

INDUSTRY GROUPS, SIC

78: Motion Pictures
79: Amusement and recreation services
80: Health services
82: Educational services
83: Social services
84: Museums, botanical, zoological gardens
86: Membership organizations

CULTURAL/INSTITUTIONAL ESTABLISHMENTS BY C&I DISTRICTS AND MAIN INDUSTRY GROUPS (SIC)
1990

District	78	79	80	82	83	84	86	Total
Bay View	3	7	9	3	17	0	21	60
Civic Center	20	39	157	22	44	3	77	362
Financial	27	37	175	41	59	6	118	463
Mission	10	18	164	16	68	1	53	330
N. Beach/Chinatwn	21	22	303	16	38	6	77	483
North Central	35	54	512	38	106	8	85	838
North West	10	15	358	26	64	4	42	519
SOMA	66	47	31	34	91	3	89	361
South West	36	42	359	46	96	1	113	693
Van Ness	17	11	165	19	32	2	49	295
Other	1	8	11	4	7	0	9	40
Total	246	300	2,244	265	622	34	733	4,444

Percentage distribution of establishments by C&I Districts

District	78	79	80	82	83	84	86	Total
Bay View	1.22	2.33	0.40	1.13	2.73	0.00	2.86	1.35
Civic Center	8.13	13.00	7.00	8.30	7.07	8.82	10.50	8.15
Financial	10.98	12.33	7.80	15.47	9.49	17.65	16.10	10.42
Mission	4.07	6.00	7.31	6.04	10.93	2.94	7.23	7.43
N. Beach/Chinatwn	8.54	7.33	13.50	6.04	6.11	17.65	10.50	10.87
North Central	14.23	18.00	22.82	14.34	17.04	23.53	11.60	18.86
North West	4.07	5.00	15.95	9.81	10.29	11.76	5.73	11.68
SOMA	26.83	15.67	1.38	12.83	14.63	8.82	12.14	8.12
South West	14.63	14.00	16.00	17.36	15.43	2.94	15.42	15.59
Van Ness	6.91	3.67	7.35	7.17	5.14	5.88	6.68	6.64
Other	0.41	2.67	0.49	1.51	1.13	0.00	1.23	0.90
Total	100	100	100	100	100	100	100	100

Percentage distribution of establishments by Main Industry Groups (SIC)

District	78	79	80	82	83	84	86	Total
Bay View	5.00	11.67	15.00	5.00	28.33	0.00	35.00	100
Civic Center	5.52	10.77	43.37	6.08	12.15	0.83	21.27	100
Financial	5.83	7.99	37.80	8.86	12.74	1.30	25.49	100
Mission	3.03	5.45	49.70	4.85	20.61	0.30	16.06	100
N. Beach/Chinatwn	4.35	4.55	62.73	3.31	7.87	1.24	15.94	100
North Central	4.18	6.44	61.10	4.53	12.65	0.95	10.14	100
North West	1.93	2.89	68.98	5.01	12.33	0.77	8.09	100
SOMA	18.28	13.02	8.59	9.42	25.21	0.83	24.65	100
South West	5.19	6.06	51.80	6.64	13.85	0.14	16.31	100
Van Ness	5.76	3.73	55.93	6.44	10.85	0.68	16.61	100
Other	2.50	20.00	27.50	10.00	17.50	0.00	22.50	100
Total	5.54	6.75	50.50	5.96	14.00	0.77	16.49	100

Source: Department of City Planning
County Business Patterns, 1990

3.2.3 ESTABLISHMENTS BY ZIP CODE AND LAND USE ACTIVITY

The County Business Patterns provides detailed information about establishments by zip codes for 1990. The following tables, 3.2.10 and 3.2.11 show the distribution of establishments by zip code and Land Use Activities.

The largest concentration of establishments is within the Financial District's zip code 94105 with over 3,000 establishments. Around 37 percent of all Financial District establishments were located in zip code 94105. The largest concentration of Office establishments was located in 94104 (2,064) within the Financial District. The largest concentration of Industrial establishments was 15 percent in 94103, (South of Market).

ESTABLISHMENTS BY ZIP CODE AND LAND USE ACTIVITY, 1990

Table 3.2.8

District	Zipcode	Office	Retail	Indust	Hotel	Cult/inst	Unclass	Total
Bay View	94124	123	212	692	6	60	36	1,129
Civic Center	94102	519	536	167	53	362	68	1,705
	94104	2,064	164	159	9	101	94	2,591
	94105	1,567	478	639	18	288	82	3,072
Financial	94111	1,738	351	308	13	98	119	2,627
Mission	94110	193	519	337	8	330	86	1,473
North	94108	611	682	249	29	346	96	2,013
Beach/Chinatown	94133	430	652	233	17	145	55	1,532
	94114	183	298	83	4	160	45	773
	94115	208	310	83	13	405	54	1,073
	94117	91	227	59	15	172	42	606
North Central	94123	259	372	69	34	145	35	914
	94118	261	397	114	2	415	54	1,243
	94121	120	212	89	4	109	41	575
North West	94129	3	7	1	0	10	0	21
	94103	752	691	875	31	227	96	2,672
SOMA	94107	500	338	744	2	147	88	1,819
	94112	122	203	152	6	136	42	661
	94114	183	298	83	4	160	45	773
	94116	115	189	158	6	88	34	590
	94122	180	301	132	5	137	45	800
	94127	113	149	51	1	119	28	461
	94131	104	90	59	1	56	30	340
	94132	53	169	31	1	119	12	385
	94134	51	65	87	0	41	18	262
South West	94143	1	0	1	0	5	1	8
Van Ness	94109	487	604	155	44	295	76	1,661
Other		139	167	158	6	60	29	559
Total		11,170	8,681	5,968	332	4,736	1,451	32,338

Source: Department of City Planning
County Business Patterns, 1990

Table 3.2.9

ESTABLISHMENT PERCENTAGE BY ZIP CODE AND LAND USE ACTIVITY, 1990

District	Zipcode	Office	Retail	Indust	Hotel	Cult/inst	Unclass	Total
Bay View	94124	1.10	2.44	11.60	1.81	1.27	2.48	3.49
Civic Center	94102	4.65	6.17	2.80	15.96	7.64	4.69	5.27
	94104	18.48	1.89	2.66	2.71	2.13	6.48	8.01
	94105	14.03	5.51	10.71	5.42	6.08	5.65	9.50
Financial	94111	15.56	4.04	5.16	3.92	2.07	8.20	8.12
Mission	94110	1.73	5.98	5.65	2.41	6.97	5.93	4.56
North	94108	5.47	7.86	4.17	8.73	7.31	6.62	6.22
Beach/Chinatown	94133	3.85	7.51	3.90	5.12	3.06	3.79	4.74
	94114	1.64	3.43	1.39	1.20	3.38	3.10	2.39
	94115	1.86	3.57	1.39	3.92	8.55	3.72	3.32
	94117	0.81	2.61	0.99	4.52	3.63	2.89	1.87
North Central	94123	2.32	4.29	1.16	10.24	3.06	2.41	2.83
	94118	2.34	4.57	1.91	0.60	8.76	3.72	3.84
	94121	1.07	2.44	1.49	1.20	2.30	2.83	1.78
North West	94129	0.03	0.08	0.02	0.00	0.21	0.00	0.06
	94103	6.73	7.96	14.66	9.34	4.79	6.62	8.26
SOMA	94107	4.48	3.89	12.47	0.60	3.10	6.06	5.62
	94112	1.09	2.34	2.55	1.81	2.87	2.89	2.04
	94114	1.64	3.43	1.39	1.20	3.38	3.10	2.39
	94116	1.03	2.18	2.65	1.81	1.86	2.34	1.82
	94122	1.61	3.47	2.21	1.51	2.89	3.10	2.47
	94127	1.01	1.72	0.85	0.30	2.51	1.93	1.43
	94131	0.93	1.04	0.99	0.30	1.18	2.07	1.05
	94132	0.47	1.95	0.52	0.30	2.51	0.83	1.19
	94134	0.46	0.75	1.46	0.00	0.87	1.24	0.81
South West	94143	0.01	0.00	0.02	0.00	0.11	0.07	0.02
Van Ness	94109	4.36	6.96	2.60	13.25	6.23	5.24	5.14
Other		1.24	1.92	2.65	1.81	1.27	2.00	1.73
Total		100	100	100	100	100	100	100

Source: Department of City Planning
County Business Patterns, 1990

Retail establishments were mainly concentrated in 94103 (South of Market), 94108 and 94133 (North Beach/Chinatown).

This subdivision of Commerce and Industry Districts into zip code areas highlights uneven distribution of establishments and activities in some districts. North West shows almost 70 percent of all its establishments in 94118, while 94129 had only 1 percent. North Central shows only 18 percent in 94117, one of its four zip code areas. Within South of Market, zip code 94103 shows almost 60 percent of establishments and 94107 40 percent.

The Financial District shows a relatively even distribution of Office establishments among its three zip code areas, but the other establishments are concentrated in 94105.

3.2.4 ESTABLISHMENTS BY SIZE CLASS

The establishment data by size class and C&I District are also provided by County Business Patterns, 1990. Size classes are determined by the number of paid employees in the mid-March period per establishment. The size class 1 to 4 includes establishments that did not report any paid employees in the mid-March pay period but paid wages to at least one employee at some time during the year.

The smallest establishments, 1 to 4 employees, account for more than 50 percent of the total number of establishments. Establishments with 5 to 9, 10 to 19, and 20 to 49 employees constitute over 40 percent of the total number of establishments. And the last five classifications which range from 50 to more than a thousand employees represent over 5 percent of the total number of establishments.

Establishments with more than 500 employees are concentrated in the Financial District with 41 establishments of the 90 recorded by County Business Patterns. South of Market and North Central have 13 and 8 of these large establishments respectively.

The smallest establishments (E1-4), which are less concentrated than large establishments, are located 22 percent in the Financial District and 16 percent in the South West District. All districts have their largest number of establishments within the smallest classification. However, while Bay View shows only 39 percent of its total number of establishments in the smallest classification, North Central, North West, and South West show over 60 percent each. Bay View District also shows a greater proportional share for establishments of 5 to 9, 10 to 19, and 20 to 49 employees, than any other district. Bay View, Mission and South of Market Districts show a significant proportion of their establishments with 5 to 9 employees (23, 20, and 20 percent). The Financial District shows a greater proportional share of establishments with 500 to 999 employees than other districts, with over 60 percent.

Table 3.2.10

ESTABLISHMENTS BY C&I DISTRICTS AND SIZE CLASS
1990

District	E1-4	E5-9	E10-19	E20-49	E50-99	E100-24	E250-49	E500-99	E1000	Total
Bay View	443	257	195	156	42	29	6	1	0	1,129
Civic Center	953	308	197	140	57	29	15	2	4	1,705
Financial	3,797	1,501	1,234	1,007	392	251	67	31	10	8,290
Mission	861	302	190	87	23	6	2	1	1	1,473
N. Beach/Chinatwn	1,935	733	438	295	77	47	13	6	1	3,545
North Central	2,043	643	375	215	53	23	6	1	7	3,366
North West	1,155	348	206	94	16	14	3	0	3	1,839
SOMA	2,060	915	655	547	195	83	23	4	9	4,491
South West	2,758	788	445	201	49	30	8	1	0	4,280
Van Ness	964	306	205	126	36	16	7	0	1	1,661
Other	275	114	70	48	19	19	7	4	3	559
Total	17,244	6,215	4,210	2,916	959	547	157	51	39	32,338

Percentage distribution by Size Class

District	E1-4	E5-9	E10-19	E20-49	E50-99	E100-24	E250-49	E500-99	E1000	Total
Bay View	2.57	4.14	4.63	5.35	4.38	5.30	3.82	1.96	0.00	3.49
Civic Center	5.53	4.96	4.68	4.80	5.94	5.30	9.55	3.92	10.26	5.27
Financial	22.02	24.15	29.31	34.53	40.88	45.89	42.68	60.78	25.64	25.64
Mission	4.99	4.86	4.51	2.98	2.40	1.10	1.27	1.96	2.56	4.56
N. Beach/Chinatwn	11.22	11.79	10.40	10.12	8.03	8.59	8.28	11.76	2.56	10.96
North Central	11.85	10.35	8.91	7.37	5.53	4.20	3.82	1.96	17.95	10.41
North West	6.70	5.60	4.89	3.22	1.67	2.56	1.91	0.00	7.69	5.69
SOMA	11.95	14.72	15.56	18.76	20.33	15.17	14.65	7.84	23.08	13.89
South West	15.99	12.68	10.57	6.89	5.11	5.48	5.10	1.96	0.00	13.24
Van Ness	5.59	4.92	4.87	4.32	3.75	2.93	4.46	0.00	2.56	5.14
Other	1.59	1.83	1.66	1.65	1.98	3.47	4.46	7.84	7.69	1.73
Total	100	100	100	100	100	100	100	100	100	100

Percentage distribution by C&I District

District	E1-4	E5-9	E10-19	E20-49	E50-99	E100-24	E250-49	E500-99	E1000	Total
Bay View	39.24	22.76	17.27	13.82	3.72	2.57	0.53	0.09	0.00	100
Civic Center	55.89	18.06	11.55	8.21	3.34	1.70	0.88	0.12	0.23	100
Financial	45.80	18.11	14.89	12.15	4.73	3.03	0.81	0.37	0.12	100
Mission	58.45	20.50	12.90	5.91	1.56	0.41	0.14	0.07	0.07	100
N. Beach/Chinatwn	54.58	20.68	12.36	8.32	2.17	1.33	0.37	0.17	0.03	100
North Central	60.70	19.10	11.14	6.39	1.57	0.68	0.18	0.03	0.21	100
North West	62.81	18.92	11.20	5.11	0.87	0.76	0.16	0.00	0.16	100
SOMA	45.87	20.37	14.58	12.18	4.34	1.85	0.51	0.09	0.20	100
South West	64.44	18.41	10.40	4.70	1.14	0.70	0.19	0.02	0.00	100
Van Ness	58.04	18.42	12.34	7.59	2.17	0.96	0.42	0.00	0.06	100
Other	49.19	20.39	12.52	8.59	3.40	3.40	1.25	0.72	0.54	100
Total	53.32	19.22	13.02	9.02	2.97	1.69	0.49	0.16	0.12	100

Source: Department of City Planning
County Business Patterns, 1990

City-wide, there are 17,244 establishments with 1 to 4 employees and 70 establishments with more than 250 employees, which means that for each large establishment there are 70 small establishments. This proportion is much lower in the Financial and Civic Center Districts, where there are only 35 and 45 small establishments for each large establishment. On the other side, the South West and Mission Districts have more small establishments per each large establishment that the citywide average, 306 and 215, respectively.

3.2.5 Nonprofit Organizations

The nonprofit organization data have been included to describe the activity of nonprofit agencies in San Francisco, which is larger than in other cities. These data were provided by the University of San Francisco, Institute for Nonprofit Organization Management. They include all organizations recorded as "non-profit" by the California Secretary of State, recorded as "tax exempt" by the Internal Revenue Service and the California State Franchise Tax Board, and that receive less than half of their income from market sales or government.

The nonprofit organization data are presented by Land Use Activity and Commerce and Industry Districts (See Data formats for detailed explanation, page 3). They were originally compiled by SIC code and then grouped into the Land Use Activity classification for the purpose of this report. They were also grouped by Commerce and Industry District based on the Zip Code indicated for each organization. Some organizations indicated their addresses for mailing purposes only and do not operate at that specific location or do not have a specific location for their activities. Some organizations operate outside of the city but use a San Francisco mailing address, therefore these figures are not comparable to the establishment data presented in the previous pages which only include establishments with specific locations.

Table 3.2.11

NONPROFIT ORGANIZATIONS BY C&I DISTRICT AND LAND USE ACTIVITY
1992

LANDUSE	Cult./Inst.	Hotel	Office	Indust	Retail	Total
DISTRICTS						
Bay View	76	2	20	0	0	98
Civic Center	331	8	136	3	1	479
Financial	613	25	434	6	3	1,081
Mission	242	11	57	3	0	313
North Beach	300	9	222	3	0	534
North Central	486	12	160	6	1	665
North West	292	3	83	2	0	380
SOMA	418	12	92	7	0	529
South West	1,001	11	234	11	1	1,258
Van Ness	181	6	71	2	1	261
Others	27	1	16	1	0	45
TOTAL	3,967	100	1,525	44	7	5,643

NONPROFIT ORGANIZATIONS BY C&I DISTRICT AND LAND USE ACTIVITY
Percentage Distribution by Land Use Activities
1992

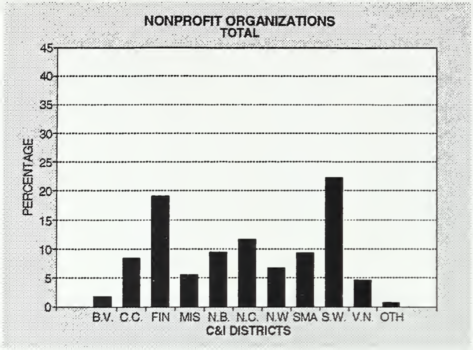
LANDUSE	Cult./Inst.	Hotel	Office	Indust	Retail	Total
DISTRICTS						
Bay View	1.9	2.0	1.3	0.0	0.0	1.7
Civic Center	8.3	8.0	8.9	6.8	14.3	8.5
Financial	15.5	25.0	28.5	13.6	42.9	19.2
Mission	6.1	11.0	3.7	6.8	0.0	5.5
North Beach	7.6	9.0	14.6	6.8	0.0	9.5
North Central	12.3	12.0	10.5	13.6	14.3	11.8
North West	7.4	3.0	5.4	4.5	0.0	6.7
SOMA	10.5	12.0	6.0	15.9	0.0	9 4
South West	25.2	11.0	15.3	25.0	14.3	22.3
Van Ness	4.6	6.0	4.7	4.5	14.3	4.6
Others	0.7	1.0	1.0	2.3	0.0	0.8
TOTAL	100	100	100	100	100	100

NONPROFIT ORGANIZATIONS BY C&I DISTRICTS AND LAND USE ACTIVITY
Percentage Distribution by C&I Districts
1992

LANDUSE	Cult./Inst.	Hotel	Office	Indust	Retail	Total
C&I DISTRICTS						
Bay View	77.6	2.0	20.4	0.0	0.0	100
Civic Center	69.1	1.7	28.4	0.6	0.2	100
Financial	56.7	2.3	40.1	0.6	0.3	100
Mission	77.3	3.5	18.2	1.0	0.0	100
North Beach	56.2	1.7	41.6	0.6	0.0	100
North Central	73.1	1.8	24.1	0.9	0.2	100
North West	76.8	0.8	21.8	0.5	0.0	100
SOMA	79.0	2.3	17.4	1.3	0.0	100
South West	79.6	0.9	18.6	0.9	0.1	100
Van Ness	69.3	2.3	27.2	0.8	0.4	100
Others	60.0	2.2	35.6	2.2	0.0	100
TOTAL	70.3	1.8	27.0	0.8	0.1	100

Source: Department of City Planning
University Of San Francisco

Graph 3.2.1



At the beginning of 1993, there were more than 5,600 nonprofit organizations recorded in San Francisco. More than 70 percent of them were engaged in Cultural/Institutional activities. Nonprofit organizations that primarily use Office space represented the second largest group with more than 1,500 accounting for 27 percent. Nonprofit organizations operating hotels, industrial, or retail establishments represented all together a very small group of 150, less than 3 percent of the total.

In terms of their geographical distribution, they were mainly located in the South West, Financial, and North Central Districts with 1,260, 1,080, and 670 organizations respectively, together accounting for more than 40 percent of all organizations in the city. These three Districts showed the highest percentage of Cultural/Institutional establishments in the previous section, many of which are nonprofit organizations.

3.3 WAGES AND INCOME, RETAIL SALES, CITY REVENUES AND EXPENDITURES

This section presents data about major trends in money transactions in San Francisco that result from and influence economic activities. There are four sections focusing on different sectors of the City's economy. First, we examine the income that individuals receive from their work in San Francisco, either from wages and salaries or from self-employment. This section complements the earlier discussion of employment by describing the earnings from employment. The second section describes taxable sales by type of business and over time, from 1980 to 1992. The third section describes the revenues and expenditures of the City and County of San Francisco and how they have changed over time. The fourth section reviews revenues data of nonprofit organizations, complementing the establishment section where the number of organizations have been listed. Data about business revenues are not included in this year's update since no additional data have become available.

3.3.1 WAGES AND PROPRIETORS' INCOME

This section presents two sets of data which describe the earnings of those who are employed in San Francisco. The first set, from the California Employment Development Department, includes employees' wages and salaries as reported by businesses in their payroll records. The second set is generated by the US Department of Commerce, Bureau of Economic Analysis, and reports wages and salaries plus any additional personal income.

The first data set is presented for the 1976-92 period and grouped by Land Use Activities (See Introduction, Data formats, page 3) as

Office, Retail, Industrial, Hotel, Cultural/Institutional, and Government. This is the same Land Use Activity classification used to organize employment and establishment data. Annual wage data are presented in four tables: in current dollars, dollars adjusted for inflation, in percentage distribution by Land Use Activities, and percentage change over time.

The California Employment Development Department (EDD) includes under this set of data all full-time and part-time employees, including employees on paid vacation or sick leave who work in or receive compensation from establishments for any part of the pay period which includes the 12th of the month. Self-employed people, unpaid volunteers, and family workers as well as private household workers, and persons in labor-management disputes are excluded. As indicated in the Employment section, the data provided for 1991 and 1992 may differ from previous years because the data collection procedures changed in 1991. The new procedures required employers to report employment and payroll figures by physical location. Prior to 1991, employers only reported total number of employees for a single business aggregating all employment from different locations, sometimes placed in different cities. During 1991, the new procedures were partially implemented and during 1992 they were almost completely implemented. This change in procedure may have resulted in inflated employment figures for San Francisco prior to 1992 because businesses headquartered in San Francisco may have reported out-of-San Francisco employees.

The bottom part of Table 3.3.1, showing dollar figures adjusted by inflation, describes changes over time in a more meaningful manner. Wages were adjusted based on the Consumer Price Index (CPI) from US Department of Labor, Bureau of Labor Statistics. This CPI corresponds to the designated reference date 1982-84 for the San Francisco-Oakland-San Jose area for all urban consumers. Adjusted figures show a total aggregate wage increase of 26 percent from 1976 to 1992. There was an overall increase (over 50 percent) in adjusted wages for Government, Hotel, Office and

Cultural/Institutional. During the same period, there was over a 25 percent decrease in adjusted wages for Industrial activities. Since 1987, the total volume of adjusted wages has shown negative or very small annual growth resulting in a overall decline of 11 percent by 1992. The decline of 2.6 percent from 1990-91, slowed down to 2.1 the following year. Cultural/Institutional has been the only wage group that maintained a constant growth from 1976 to 1992. Office and Retail wages showed a constant increase until 1987 when they started declining or having a very small increase.

In spite of the decline of the Industrial wages it still represented the second largest wage group in 1992, with 26 percent of total wages. Cultural/Institutional Activities increased their citywide share to 18 percent in 1992. Retail and Government Activities have retained similar citywide shares over the past sixteen years.

Looking at the wage distribution among Land Use Activities in table 3.3.2, Office Activity, which increased from 27 percent of total wages in 1976 to 39 percent in 1987, declined to 35 percent in 1992.

Table 3.3.1

UNADJUSTED WAGES BY LAND USE ACTIVITIES
(Annual wages in $1000)
1976-1992

YEAR	OFFICE	RETAIL	INDUSTRIAL	HOTEL	CULTURAL/ INSTITUTNL	GOV'T	TOTAL
1976	1,416,229	522,625	2,255,581	88,499	571,603	423,918	5,278,455
1977	1,752,855	641,370	2,526,903	92,610	682,577	607,525	6,303,840
1978	2,019,916	716,664	2,787,175	107,990	1,000,960	864,382	7,497,086
1979	2,431,000	793,809	3,038,164	124,473	1,060,435	909,671	8,357,551
1980	2,852,290	874,058	3,499,510	141,813	1,227,834	987,823	9,583,327
1981	3,350,514	955,233	3,896,590	159,581	1,393,885	1,005,278	10,761,082
1982	3,716,700	1,000,375	4,240,243	171,686	1,512,206	1,056,912	11,698,122
1983	4,484,841	1,065,764	3,968,472	187,065	1,649,417	1,067,565	12,423,124
1984	4,784,700	1,163,844	4,199,647	219,380	1,766,830	1,157,681	13,292,083
1985	5,185,970	1,255,971	4,323,051	228,774	1,938,145	1,251,023	14,182,933
1986	5,748,693	1,344,814	4,355,612	247,127	2,087,072	1,261,079	15,044,397
1987	6,106,578	1,398,147	4,291,995	281,649	2,270,605	1,329,020	15,677,995
1988	5,467,106	1,457,764	4,346,151	313,179	2,378,600	1,405,588	15,368,389
1989	5,708,481	1,516,339	4,402,284	313,100	2,567,696	1,471,306	15,979,205
1990	6,013,319	1,566,210	4,463,328	357,357	2,845,466	1,598,432	16,844,112
1991	5,889,576	1,562,518	4,550,031	377,699	3,032,210	1,705,974	17,118,008
1992	6,065,744	1,608,592	4,352,726	373,044	3,118,622	1,669,002	17,187,730

ADJUSTED WAGES BY LAND USE ACTIVITIES
Annual wages adjusted by inflation (CPI 1982-84=100) in $1000
1976-1992

YEAR	OFFICE	RETAIL	INDUSTRIAL	HOTEL	CULTURAL/ INSTITUTIONAL	GOV'T	TOTAL
1976	2,593,825	957,189	4,131,102	162,086	1,046,892	776,407	9,667,501
1977	2,981,046	1,090,765	4,297,454	157,499	1,160,845	1,033,206	10,720,816
1978	3,141,393	1,114,563	4,334,642	167,947	1,556,702	1,344,296	11,659,543
1979	3,482,808	1,137,262	4,352,671	178,328	1,519,247	1,303,254	11,973,569
1980	3,547,624	1,087,136	4,352,624	176,384	1,527,157	1,228,636	11,919,561
1981	3,689,993	1,052,019	4,291,398	175,750	1,535,116	1,107,135	11,851,412
1982	3,808,094	1,024,975	4,344,511	175,908	1,549,392	1,082,901	11,985,781
1983	4,557,765	1,083,093	4,033,000	190,106	1,676,237	1,084,924	12,625,126
1984	4,600,673	1,119,081	4,038,123	210,942	1,698,875	1,113,155	12,780,849
1985	4,784,105	1,158,645	3,988,055	211,046	1,787,956	1,154,080	13,083,887
1986	5,151,159	1,205,031	3,902,878	221,440	1,870,136	1,129,999	13,480,643
1987	5,291,662	1,211,566	3,719,233	244,063	1,967,596	1,151,664	13,585,784
1988	4,537,018	1,209,763	3,606,764	259,900	1,973,942	1,166,463	12,753,849
1989	4,516,203	1,199,635	3,482,820	247,706	2,031,405	1,164,008	12,641,776
1990	4,552,096	1,185,624	3,378,749	270,520	2,154,024	1,210,017	12,751,031
1991	4,270,904	1,133,080	3,299,515	273,893	2,198,847	1,237,109	12,413,349
1992	4,289,777	1,137,618	3,078,307	263,822	2,205,532	1,180,341	12,155,396

Source: Department of City Planning
Employment Development Department

Table 3.3.2

In 1992, the total wage paid to workers in the city in current dollars reached $17.2 billion, which is twice the 1980 amount and three times the 1976 amount, in unadjusted dollars.

WAGES BY LAND USE ACTIVITIES
Percentage distribution of annual wages by Land Use Activities
1976-1992

YEAR	OFFICE	RETAIL	INDUSTRL	HOTEL	CULTURAL/ INSTITNL	GOV'T	TOTAL
1976	26.8	9.9	42.7	1.7	10.8	8.0	100
1977	27.8	10.2	40.1	1.5	10.8	9.6	100
1978	26.9	9.6	37.2	1.4	13.4	11.5	100
1979	29.1	9.5	36.4	1.5	12.7	10.9	100
1980	29.8	9.1	36.5	1.5	12.8	10.3	100
1981	31.1	8.9	36.2	1.5	13.0	9.3	100
1982	31.8	8.6	36.2	1.5	12.9	9.0	100
1983	36.1	8.6	31.9	1.5	13.3	8.6	100
1984	36.0	8.8	31.6	1.7	13.3	8.7	100
1985	36.6	8.9	30.5	1.6	13.7	8.8	100
1986	38.2	8.9	29.0	1.6	13.9	8.4	100
1987	38.9	8.9	27.4	1.8	14.5	8.5	100
1988	35.6	9.5	28.3	2.0	15.5	9.1	100
1989	35.7	9.5	27.6	2.0	16.1	9.2	100
1990	35.7	9.3	26.5	2.1	16.9	9.5	100
1991	34.4	9.1	26.9	2.2	17.7	10.0	100
1992	35.3	9.4	25.3	2.2	18.1	9.7	100

WAGES BY LAND USE ACTIVITIES
Percentage change of annual wages adjusted by inflation (CPI 1982-84=100)
1976-1992

YEAR	OFFICE	RETAIL	INDUSTR	HOTEL	CULT./ INST	GOV'T	TOTAL
1976-77	14.9	14.0	4.0	-2.8	10.9	33.1	10.9
1977-78	5.4	2.2	0.9	6.6	34.1	30.1	8.8
1978-79	10.9	2.0	0.4	6.2	-2.4	-3.1	2.7
1979-80	1.9	-4.4	-0.0	-1.1	0.5	-5.7	-0.5
1980-81	4.0	-3.2	-1.4	-0.4	0.5	-9.9	-0.6
1981-82	3.2	-2.6	1.2	0.1	0.9	-2.2	1.1
1982-83	19.7	5.7	-7.2	8.1	8.2	0.2	5.3
1983-84	0.9	3.3	0.1	11.0	1.4	2.6	1.2
1984-85	4.0	3.5	-1.2	0.0	5.2	3.7	2.4
1985-86	7.7	4.0	-2.1	4.9	4.6	-2.1	3.0
1986-87	2.7	0.5	-4.7	10.2	5.2	1.9	0.8
1987-88	-14.3	-0.1	-3.0	6.5	0.3	1.3	-6.1
1988-89	-0.5	-0.8	-3.4	-4.7	2.9	-0.2	-0.9
1989-90	0.8	-1.2	-3.0	9.2	6.0	4.0	0.9
1990-91	-6.2	-4.4	-2.3	1.2	2.1	2.2	-2.6
1991-92	0.4	0.4	-6.7	-3.7	0.3	-4.6	-2.1
1976-92	65.4	18.8	-25.5	62.8	110.7	52.0	25.7

Source: Department of City Planning
Employment Development Center

PERSONAL INCOME BY PLACE OF WORK BY EARNING TYPE
Earnings in $1,000
1981-1990

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Wages and Salaries	11,517,526	12,420,176	13,277,476	14,200,425	15,112,860	16,052,893	16,613,259	17,685,362	18,537,284	19,502,144
Other labor income	1,125,502	1,306,132	1,389,133	1,417,431	1,416,706	1,482,527	1,503,498	1,545,467	1,626,800	1,691,626
Proprietors' income	1,009,270	962,011	1,290,144	1,514,831	1,794,484	1,987,869	2,260,448	2,199,030	2,731,124	3,000,821
TOTAL	13,652,298	14,688,319	15,956,753	17,132,687	18,324,050	19,523,289	20,377,205	21,429,859	22,895,208	24,194,591

PERSONAL INCOME BY PLACE OF WORK BY EARNING TYPE
Earnings adjusted by inflation (CPI 1982=100) in $1,000
1981-1990

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Wages and Salaries	12,684,500	12,725,590	13,493,370	13,654,255	13,941,753	14,384,313	14,396,238	14,676,649	14,665,573	14,763,167
Other labor income	1,239,540	1,338,250	1,411,721	1,362,914	1,306,924	1,328,429	1,302,858	1,282,545	1,287,025	1,280,565
Proprietors' income	1,111,531	985,667	1,311,122	1,456,568	1,655,428	1,781,245	1,958,794	1,824,921	2,160,699	2,271,628
TOTAL	15,035,570	15,049,507	16,216,212	16,473,738	16,904,105	17,493,987	17,657,890	17,784,115	18,113,297	18,315,360

PERSONAL INCOME BY PLACE OF WORK BY EARNING TYPE
Percentage distribution by earning type
1981-1990

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Wages and Salaries	84.36	84.56	83.21	82.88	82.48	82.22	81.53	82.53	80.97	80.61
Other labor income	8.24	8.89	8.71	8.27	7.73	7.59	7.38	7.21	7.11	6.99
Proprietors' income	7.39	6.55	8.09	8.84	9.79	10.18	11.09	10.26	11.93	12.40
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

PERSONAL INCOME BY PLACE OF WORK BY EARNING TYPE
Annual percentage change of earnings adjusted by inflation (CPI 1982=100)
1981-1990

	1981-82	1982-83	1983-84	1984-85	1985-86	1986-87	1987-88	1988-89	1989-90	1981-90
Wages and Salaries	0.32	6.03	1.19	2.11	3.17	0.08	-3.96	6.01	-0.08	1.42
Other labor income	7.96	5.49	-3.46	-4.11	1.65	-1.92	-5.28	5.07	0.35	0.35
Proprietors' income	-11.32	33.02	11.09	13.65	7.60	9.97	-0.95	11.76	18.40	8.58
TOTAL	0.09	7.75	1.59	2.61	3.49	0.94	-3.72	6.60	1.85	1.86

Source:Department of City Planning
US Department of Commerce, Bureau of Economic Analysis

The second set of data, personal income data for the 1981-1990 period, is published annually by the Regional Economic Measurement Division of the Bureau of Economic Analysis (BEA), US Department of Commerce. It has the advantage of including any additional proprieter's income and earnings from self-employed persons which are not included in the EDD'S wage and salary data. The personal income data do not contain enough description of the type of employment to use the Land Use Activity classifications developed for this inventory and used elsewhere in this report.

Table3.3.4

PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP
Earnings in $1,000
1981-1990

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Agricultural	21,211	21,330	26,193	28,380	29,151	30,466	38,069	40,498	42,898	49,339
Mining	170,670	169,766	200,710	187,687	201,294	132,009	96,366	102,643	88,553	113,356
Construction	865,205	1,027,534	648,819	657,655	707,479	792,924	858,520	850,822	817,347	87[illegible],041
Manufacturin	1,253,979	1,349,979	1,380,836	1,422,562	1,363,166	1,382,408	1,423,612	1,451,144	1,523,612	1,426,920
Nondurable	926,499	1,027,408	1,073,972	1,089,315	1,035,479	1,090,436	1,111,296	1,141,114	1,203,390	1,160,886
Durable	327,480	322,571	306,864	333,247	327,687	291,972	312,316	310,030	320,222	226,[illegible]34
Transp/P.U.	1,592,653	1,662,843	1,782,861	1,843,325	1,882,551	1,788,367	1,688,492	1,726,316	1,726,330	1,81[illegible],671
Wholesale	1,093,065	1,096,872	1,087,295	1,254,882	1,346,191	1,430,041	1,318,020	1,379,768	1,453,182	1,424,760
Retail trade	1,019,720	1,072,691	1,160,556	1,230,815	1,319,546	1,427,008	1,491,858	1,582,523	1,661,376	1,742,272
F.I.R.E.	2,179,204	2,350,933	2,744,241	2,887,567	3,206,712	3,689,206	3,870,688	4,224,993	4,[illegible]71,960	4,297,490
Services	3,452,486	3,823,734	4,665,771	5,175,007	5,619,825	6,115,079	6,662,501	7,450,323	8,145,666	8,850,133
Government	2,004,105	2,112,637	2,259,471	2,444,807	2,648,135	2,735,781	2,928,779	3,041,472	3,264,284	3,609,579
Federal	701,268	715,243	768,797	818,890	856,340	844,739	867,755	922,392	960,881	1,020,373
Military	127,171	145,005	150,167	156,247	159,112	159,663	161,537	155,904	147,509	155,447
State/local	1,175,646	1,252,389	1,340,507	1,469,670	1,632,683	1,731,379	1,899,487	1,963,176	2,155,894	2,433,759
TOTAL	13,652,298	14,688,319	15,956,753	17,132,687	18,324,050	19,523,289	20,377,205	26,343,118	27,683,104	29,191,060

PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP
Earnings adjusted by inflation (CPI 1982=100) in $1,000
1981-1990

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Agricultural	23,360	21,855	26,619	27,288	26,892	27,299	32,989	33,608	33,938	37,350
Mining	187,963	173,941	203,974	180,468	185,696	118,288	83,506	85,181	70,058	85,811
Construction	952,869	1,052,801	659,369	632,361	652,656	710,505	743,951	706,076	646,635	658,623
Manufacturin	1,381,034	1,383,175	1,403,289	1,367,848	1,257,533	1,238,717	1,233,633	1,204,269	1,205,389	1,080,182
Nondurable	1,020,373	1,052,672	1,091,435	1,047,418	955,239	977,093	962,995	946,983	952,049	878,793
Durable	360,661	330,503	311,854	320,430	302,294	261,624	270,638	257,286	253,340	171,106
Transp/P.U.	1,754,023	1,703,733	1,811,851	1,772,428	1,736,671	1,602,479	1,463,165	1,432,627	1,365,767	1,370,682
Wholesale	1,203,816	1,123,844	1,104,975	1,206,617	1,241,874	1,281,399	1,142,132	1,145,036	1,149,669	1,078,547
Retail trade	1,123,040	1,099,069	1,179,427	1,183,476	1,217,293	1,278,681	1,292,771	1,313,297	1,314,380	1,318,904
F.I.R.E.	2,400,004	2,408,743	2,788,863	2,776,507	2,958,221	3,305,740	3,354,149	3,506,218	3,300,601	3,253,210
Services	3,802,297	3,917,760	4,741,637	4,975,968	5,184,340	5,479,461	5,773,398	6,182,841	6,444,356	6,699,571
Government	2,207,164	2,164,587	2,296,210	2,350,776	2,442,929	2,451,417	2,537,937	2,524,043	2,582,503	2,732,460
Federal	772,322	732,831	781,298	787,394	789,982	756,935	751,954	765,471	760,191	772,425
Military	140,056	148,571	152,609	150,238	146,782	143,067	139,980	129,381	116,700	117,674
State/local	1,294,764	1,283,185	1,362,304	1,413,144	1,506,165	1,551,415	1,646,003	1,629,192	1,705,612	1,842,361
TOTAL	15,035,570	15,049,507	16,216,212	16,473,738	16,904,105	17,493,987	17,657,890	18,133,197	18,113,297	18,285,058

Source:Department of City Planning
US Department of Commerce, Bureau of Economic Analysis

The BEA defines Personal income as the sum of wage and salary disbursements, other labor income, proprietors' income, rental income of persons, personal dividend income, personal interest income, and transfer payments, less personal contributions for social insurance. Included here is a subset of that personal income data, "personal income by place of work," which includes wage and salary income, other labor income, and proprietors' income only. The income data are reported by employing establishments. Data about proprietors are reported by tax-filing address, which is the place of residence of the proprietor. The BEA assumes that this is also the place of work. However this may not always be the case,

Table 3.3.5

PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP
Percentage distribution by industry group
1981-1990

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Agricultural	0.16	0.15	0.16	0.17	0.16	0.16	0.19	0.19	0.19	0.20
Mining	1.25	1.16	1.26	1.10	1.10	0.68	0.47	0.47	0.39	0.47
Construction	6.34	7.00	4.07	3.84	3.86	4.06	4.21	3.89	3.57	3.60
Manufacturing	9.19	9.19	8.65	8.30	7.44	7.08	6.99	6.64	6.65	5.91
Nondurable	6.79	6.99	6.73	6.36	5.65	5.59	5.45	5.22	5.26	4.81
Durable	2.40	2.20	1.92	1.95	1.79	1.50	1.53	1.42	1.40	0.94
Transp. & P.U.	11.67	11.32	11.17	10.76	10.27	9.16	8.29	7.90	7.54	7.50
Wholesale trade	8.01	7.47	6.81	7.32	7.35	7.32	6.47	6.31	6.35	5.90
Retail trade	7.47	7.30	7.27	7.18	7.20	7.31	7.32	7.24	7.26	7.21
F.I.R.E.	15.96	16.01	17.20	16.85	17.50	18.90	19.00	19.34	18.22	17.79
Services	25.29	26.03	29.24	30.21	30.67	31.32	32.70	34.10	35.58	36.64
Government	14.68	14.38	14.16	14.27	14.45	14.01	14.37	13.92	14.26	14.94
Federal, civilian	5.14	4.87	4.82	4.78	4.67	4.33	4.26	4.22	4.20	4.22
Military	0.93	0.99	0.94	0.91	0.87	0.82	0.79	0.71	0.64	0.64
State and local	8.61	8.53	8.40	8.58	8.91	8.87	9.32	8.98	9.42	10.08
TOTAL	100	100	100	100	100	100	100	100	100	100

PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP
Annual percentage change of earnings adjusted by inflation (CPI 1982=100)
1981-1990

	1981-82	1982-83	1983-84	1984-85	1985-86	1986-87	1987-88	1988-89	1989-90	1981-90
Agricultural	-6.45	21.80	2.52	-1.45	1.51	20.84	1.88	0.98	10.05	5.44
Mining	-7.46	17.27	-11.52	2.90	-36.30	-29.40	2.01	-17.75	22.49	-4.94
Construction	10.49	-37.37	-4.10	3.21	8.86	4.71	-5.09	-8.42	1.85	-2.81
Manufacturing	0.16	1.45	-2.53	-8.06	-1.50	-0.41	-2.38	0.09	-10.39	-1.98
Nondurable	3.17	3.68	-4.03	-8.80	2.29	-1.44	-1.66	0.54	-7.69	-1.26
Durable	-8.36	-5.64	2.75	-5.66	-13.45	3.45	-4.93	-1.53	-32.46	-4.78
Transp. & P.U.	-2.87	6.35	-2.18	-2.02	-7.73	-8.69	-2.09	-4.67	0.36	-1.99
Wholesale trade	-6.64	-1.68	9.20	2.92	3.18	-10.87	0.25	0.40	-6.19	-0.95
Retail trade	-2.13	7.31	0.34	2.86	5.04	1.10	1.59	0.08	0.34	1.59
F.I.R.E.	0.36	15.78	-0.44	6.54	11.75	1.46	4.53	-5.86	-1.44	3.23
Services	3.04	21.03	4.94	4.19	5.69	5.36	7.09	4.23	3.96	6.93
Government	-1.93	6.08	2.38	3.92	0.35	3.53	-0.55	2.32	5.81	2.16
Federal, civilian	-5.11	6.61	0.78	0.33	-4.18	-0.66	1.80	-0.69	1.61	0.00
Military	6.08	2.72	-1.55	-2.30	-2.53	-2.16	-7.57	-9.80	0.83	-1.45
State and local	-0.89	6.17	3.73	6.58	3.00	6.10	-1.02	4.69	8.02	3.84
TOTAL	0.09	7.75	1.59	2.61	3.49	0.94	2.69	-0.11	0.95	1.96

Source: Department of City Planning
US Department of Commerce, Bureau of Economic Analysis

particularly in San Francisco where self-employed people (including some who do not live in San Francisco) may be likely to work outside of their home.

These data are presented under two categories: by earning type and by industry group. The tables are presented for each category following the previous format, current dollars, dollars adjusted for inflation, percentage distribution by industry group or earning type, and percentage change over time.

The total volume of earnings in 1990 (in 1990 dollars) was $24.2 billion. This was an increase of about $11 billion (unadjusted for inflation) from 1981. In adjusted dollars (1982-84=100), the total earnings in 1990 was $18.3 billion (1982 dollars). Total adjusted earnings have steadily increased from $15 billion in 1981.

From 1988 to1990, the percentage of income earned by the self-employed increased from 10.3 percent to 12.4 of all income. In 1981, 84 percent of this income was from wages and salaries, while 7 percent was from proprietors' income. In 1990, 81 percent was from wages and salaries and 12 percent was from proprietors' income. The growth in wages and salaries was relatively constant even when adjusted for inflation. Proprietors' income has been much more volatile; but over the ten-year period increased more than wages.

Tables 3.3.4 through 3.3.5 describe income distribution by main industry groups (SIC) with sub-categories for manufacturing and government. In 1990, the largest industries were services (37 percent) F.I.R.E. (18 percent) and State and local government (10 percent).

The shares of personal income derived from Services and Government increased 1989 to 1990. From 1989 to 1990, Services and State and local government are the only groups that grew more than 100 million adjusted dollars.

3.3.2 TAXABLE SALES

Sales tax permits are issued by the State of California Board of Equalization. The number of sales tax permits represents the number of businesses operated by all manufacturers, wholesalers, and retailers of tangible personal property except those dealing solely in nontaxable commodities. Permits are tabulated twice a year, January 1 and July 1. Sales tax data show the volume of taxable sales only; they do not give any information on sales, such as food for home consumption, which are not subject to sales tax.

The Board of Equalization makes the following observations about these data:

> "Total taxable transactions do not necessarily indicate the gross sales of stores dealing with taxable items. Only sales subject to sales tax are tabulated; excluded are sales for resale, sales of nontaxable items such as food for home consumption and prescription medicines, and taxable sales disclosed by board audits.
>
> Some businesses dealing primarily in nontaxable activities, such as services, manufacturing, contracting, or wholesaling, either sell some merchandise that is subject to sales tax or use some items that were purchased ex-tax and on which use tax must be paid. Such transactions are included in the tabulations.
>
> Data are compiled by type of store but cannot be broken down by commodity.
>
> Business are classified by their principal line of merchandise or service."

Data presented over time, from 1980 to 1992, (Tables 3.3.6 and 3.3.7) only include retail stores. 1992 data (Table 3.3.8) include, in addition to retail stores, the "All Other Outlets" category which accounts for non-store retailers (mobile ice cream vendors, vending machines, sales by telephone); public utilities, government agencies, educational institutions, health services, construction contractors, wholesale stores, advertising agencies, real estate agencies,

etc. Sales data presented over time are adjusted for inflation based on the Consumer Price Index for 1982-1984 from the Labor Department.

From 1980 to 1992, there was a taxable sales decline of 10 percent (adjusted for inflation) while the number of sales tax permits increased by almost 40 percent. This disparity reflects a reduction of sales per establishment. Food stores were the only store type that increased total sales over the past twelve years.

Growth of total taxable sales took place from 1982 to 1984 and from 1985 to 1990. The decline from 1990 to 1991 was almost 5 percent. This decline was even more severe from 1991 to 1992 when it reached -9 percent. These past two years represented the greatest decline over the last twelve years. Except for drug and food stores all other retail stores had a negative growth from 1990 to 1992. The largest decline was in service stations, auto dealers, general merchandise, and building material stores.

Table 3.3.8 shows the number of sales tax permits and amount of taxable sales in current dollars for 1992. The total volume of taxable sales for 1992 was about $8 billion, from which 63 percent came from retail stores and 37 percent from "all other outlets". Eating and drinking places represented the largest number of permits and largest volume of taxable transactions after "other retail stores" category. Food and apparel stores had the second largest number of permits and general merchandise stores had the second largest volume of taxable sales. General merchandise stores had the largest average taxable sales per permit while "other retail stores" had the smallest (Graphs 3.3.1 and 3.3.2).

Table 3.3.6

TAXABLE SALES TRANSACTIONS
Millions of dollars adjusted by inflation (CPI 1982-1984=100)
1980-1992 (1992 figures based on first and second quarter only)

RETAIL STORES	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
Apparel Stores	382	372	354	368	384	391	410	408	394	425	436	435	390
Auto Dealers & Auto Supplies	251	241	237	287	290	313	319	269	249	229	240	202	180
Bldg. Mat'l. & Farm Implements	161	144	128	148	149	151	167	169	166	165	159	145	126
Drug Stores	83	83	87	93	100	101	103	104	104	107	105	108	109
Eating & Drinking Places	796	787	763	803	814	841	830	853	852	836	832	812	773
Food Stores	222	247	230	247	246	244	244	252	237	232	230	252	255
General Merchandise	417	422	397	437	457	425	437	442	516	542	507	459	390
Home Furnish. & Appliances	166	153	138	155	181	185	191	168	170	193	202	192	172
Other Retail Stores	981	961	964	1,060	1,011	900	911	937	977	984	1,017	984	874
Packaged Liquor Stores	91	81	71	69	62	55	51	54	49	45	43	39	37
Service Stations	287	263	232	222	218	209	162	173	211	201	228	178	162
TOTAL	3,836	3,753	3,599	3,889	3,911	3,813	3,822	3,827	3,925	3,958	3,998	3,805	3,468

TAXABLE SALES TRANSACTIONS
Percentage Distribution By Retail Stores
1980-1992

RETAIL STORES	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
Apparel Stores	10	10	10	10	10	10	11	11	10	11	11	11	11
Auto Dealers & Auto Supplies	7	6	7	7	7	8	8	7	6	6	6	5	5
Bldg. Mat'l. & Farm Implements	4	4	4	4	4	4	4	4	4	4	4	4	4
Drug Stores	2	2	2	2	3	3	3	3	3	3	3	3	3
Eating & Drinking Places	21	21	21	21	21	22	22	22	22	21	21	21	22
Food Stores	6	7	6	6	6	6	6	7	6	6	6	7	7
General Merchandise	11	11	11	11	12	11	11	12	13	14	13	12	11
Home Furnish. & Appliances	4	4	4	4	5	5	5	4	4	5	5	5	5
Other Retail Stores	26	26	27	27	26	24	24	25	25	25	25	26	25
Packaged Liquor Stores	2	2	2	2	2	1	1	1	1	1	1	1	1
Service Stations	8	7	8	8	8	8	4	5	5	5	8	5	5
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100

TAXABLE SALES TRANSACTIONS
Annual Percentage Change
1980-1992

RETAIL STORES	80-81	81-82	82-83	83-84	84-85	85-86	86-87	87-88	88-89	89-90	90-91	91-92	80-92
Apparel Stores	-3	-5	4	5	2	5	-1	-3	8	3	-0	-10	0
Auto Dealers & Auto Supplies	-4	-1	21	1	8	2	-18	-7	-8	5	-16	-11	-2
Bldg. Mat'l. & Farm Implements	-11	-11	15	1	1	11	2	-2	-1	-4	-9	-13	-2
Drug Stores	0	4	8	7	2	1	1	0	3	-2	3	1	3
Eating & Drinking Places	-1	-3	5	1	3	-1	3	-0	-2	-1	-2	-5	-0
Food Stores	11	-7	7	-1	-1	0	4	-6	-2	-1	10	1	1
General Merchandise	1	-6	10	5	-7	3	1	17	5	-7	-9	-15	-1
Home Furnish. & Appliances	-8	-10	13	17	3	3	-12	1	14	5	-5	-10	0
Other Retail Stores	-2	0	10	-5	-11	1	3	4	1	3	-3	-11	-1
Packaged Liquor Stores	-11	-12	-3	-11	-11	-8	7	-10	-7	-6	-8	-5	-5
Service Stations	-8	-12	-5	-2	-4	-23	7	22	-5	14	-22	-9	-4
TOTAL	-2.2	-4.1	8.0	0.8	-2.5	0.2	0.1	2.5	0.8	1.0	-4.8	-8.9	-0.8

Source: Department of City Planning
State Board of Equalization

Table 3.3.7

SALES TAX PERMITS
Annual average (1992 figures based on first and second quarter only)
1980-1992

RETAIL STORES	1980	1981	1982	1983	1984	1985	1988	1987	1988	1989	1990	1991	1992
Apparel Stores	773	800	831	891	947	966	987	1,016	1,040	1,106	1,145	1,161	1,264
Auto Dealers	167	160	151	161	151	152	160	154	152	158	153	160	176
Bldg. Mat'l. & Farm Implements	205	202	193	195	200	202	206	211	217	205	208	207	223
Drug Stores	176	169	168	167	162	156	148	148	151	142	145	142	137
Eating & Drinking Places	2,862	2,869	2,898	2,953	3,063	3,083	3,145	3,140	3,201	3,220	3,191	3,208	3,290
Food Stores	1,201	1,219	1,265	1,268	1,332	1,342	1,390	1,395	1,397	1,369	1,367	1,358	1,380
General Merchandise	192	189	182	184	182	186	176	178	169	160	142	125	136
Home Furnish & Appliances	604	583	607	650	665	668	655	655	823	628	641	683	726
Other Retail Stores	2,515	2,452	2,578	2,819	3,035	3,144	3,179	3,162	3,297	3,422	3,798	4,141	5,124
Packaged Liquor Stores	212	214	200	192	186	165	160	153	147	144	141	136	131
Service Stations	295	294	285	264	242	235	221	207	193	292	178	181	160
TOTAL	9,202	9,151	9,358	9,744	10,165	10,299	10,427	10,419	10,587	10,846	11,109	11,482	12,747

SALES TAX PERMITS
Percentage Distribution By Business
1980-1992

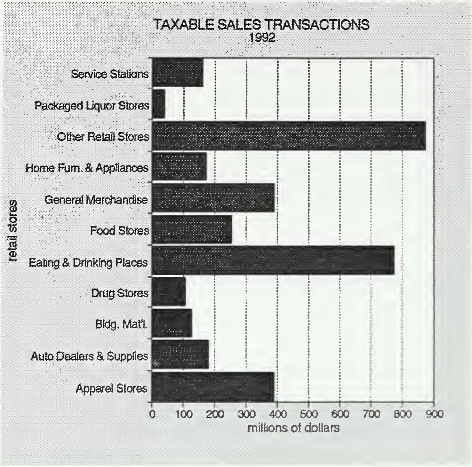
RETAIL STORES	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
Apparel Stores	8	9	9	9	9	9	10	10	10	10	10	10	10
Auto Dealers	2	2	2	2	2	2	2	2	1	2	1	1	1
Bldg. Mat'l. & Farm Implements	2	2	2	2	2	2	2	2	2	2	2	2	2
Drug Stores	2	2	2	2	2	2	1	1	1	1	1	1	1
Eating & Drinking Places	31	31	31	30	30	30	30	30	30	30	29	28	26
Food Stores	13	13	14	13	13	13	13	13	13	13	12	12	11
General Merchandise	2	2	2	2	2	2	2	2	2	2	1	1	1
Home Furnish & Appliances	7	6	7	7	7	7	6	6	6	6	6	6	6
Other Retail Stores	27	27	28	29	30	31	31	30	31	32	34	36	40
Packaged Liquor Stores	2	2	2	2	2	2	2	2	1	1	1	1	1
Service Stations	3	3	3	3	2	2	2	2	2	3	2	1	1
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100

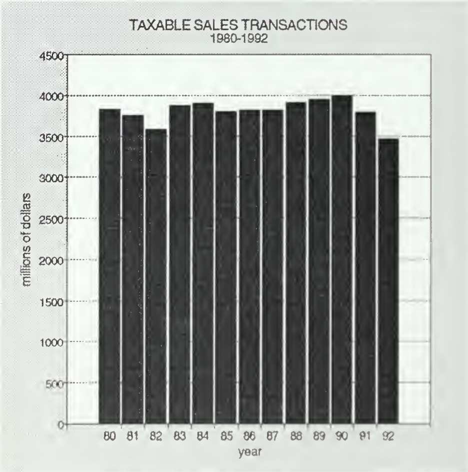
SALES TAX PERMITS
Annual Percentage Change
1980-1992

RETAIL STORES	80-81	81-82	82-83	83-84	84-85	85-86	86-87	87-88	88-89	89-90	90-91	91-92	80-92
Apparel Stores	4	4	7	6	2	2	3	2	6	4	1	9	5
Auto Dealers	-4	-6	7	-6	1	5	-4	-1	4	-3	5	10	0
Bldg. Mat'l. & Farm Implements	-2	-5	1	3	1	2	2	3	-6	2	-1	8	1
Drug Stores	-4	-1	-1	-3	-4	-5	0	2	-6	2	-2	-4	-2
Eating & Drinking Places	0	1	2	4	1	2	-0	2	1	-1	1	3	1
Food Stores	2	4	0	5	1	4	0	0	-2	-0	-1	2	1
General Merchandise	-2	-4	1	-1	2	-5	1	-5	-5	-11	-12	9	-2
Home Furnish & Appliances	-4	4	7	2	1	-2	0	-5	1	2	7	6	2
Other Retail Stores	-3	5	9	8	4	1	-1	4	4	11	9	24	9
Packaged Liquor Stores	1	-7	-4	-3	-11	-3	-4	-4	-2	-2	-4	-4	-3
Service Stations	-0	-3	-7	-8	-3	-6	-6	-7	51	-39	-10	-1	-4
TOTAL	-1	2	4	4	1	1	-0	2	2	2	3	11	3

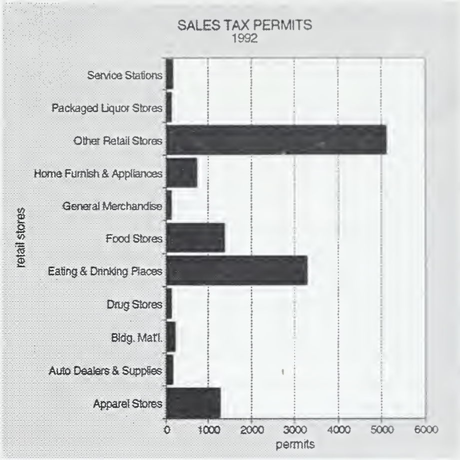
Source: Department of City Planning
State Board of Equalization

Graph 3.3.1

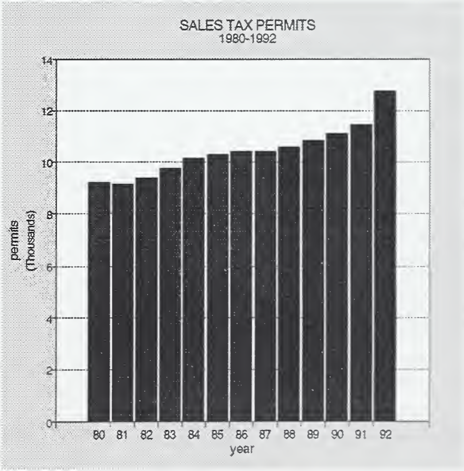

TAXABLE SALES TRANSACTIONS
1992
Service Stations
Packaged Liquor Stores
Other Retail Stores
Home Furn. & Appliances
General Merchandise
Food Stores
Eating & Drinking Places
Drug Stores
Bldg. Mat'l.
Auto Dealers & Supplies
Apparel Stores
retail stores
0 100 200 300 400 500 600 700 800 900
millions of dollars


TAXABLE SALES TRANSACTIONS
1980-1992
4500
4000
3500
3000
2500
2000
1500
1000
500
0
millions of dollars
80 81 82 83 84 85 86 87 88 89 90 91 92
year

Graph 3.3.2



SALES TAX PERMITS
1992
Service Stations
Packaged Liquor Stores
Other Retail Stores
Home Furnish & Appliances
General Merchandise
Food Stores
Eating & Drinking Places
Drug Stores
Bldg. Mat'l.
Auto Dealers & Supplies
Apparel Stores
retail stores
0
1000
2000
3000
4000
5000
6000
permits



SALES TAX PERMITS
1980-1992
permits (Thousands)
0
2
4
6
8
10
12
14
80
81
82
83
84
85
86
87
88
89
90
91
92
year

TAXABLE SALES AND SALES TAX PERMITS BY TYPE OF BUSINESS, 1992

Table 3.3.8

Type of Business	Permits	Taxable transactions (by $1,000)
Apparel stores	1,161	599,600
General merchandise stores	125	633,239
Drug stores	142	148,477
Food stores	1,358	347,011
Packaged liquor stores	136	54,366
Eating and drinking places	3,208	1,119,995
Home furnishings and appliances	683	265,212
Building material and farm implements	207	199,748
Auto dealers and auto supplies	160	278,353
Service stations	161	245,148
Other retail stores	4,141	1,356,485
Retail Stores Totals	11,482	5,247,634
All Other Outlets	17,814	3,121,844
Total All Outlets	29,296	8,369,478

TAXABLE SALES AND SALES TAX PERMITS BY TYPE OF BUSINESS, 1992
Percentage distribution by type of business

Type of Business	Permits	Taxable transactions
Apparel stores	10	11
General merchandise stores	1	12
Drug stores	1	3
Food stores	12	7
Packaged liquor stores	1	1
Eating and drinking places	28	21
Home furnishings and appliances	6	5
Building material and farm implements	2	4
Auto dealers and auto supplies	1	5
Service stations	1	5
Other retail stores	36	26
Retail Stores Totals	100	100

Source: Department of City Planning
California State Board of Equalization

3.3.3 CITY REVENUES AND EXPENDITURES

The data in this section are from the *Comprehensive Annual Financial Report for the City and County of San Francisco,* prepared by the Office of the Controller.

These tables include data concerning the General Fund, Special Revenue Funds, and Debt Service Funds. The General Fund accounts for resources that are traditionally associated with governments and that are not required to be accounted for in another fund. Special Revenue Funds are used to account for the proceeds of specific revenue sources (other than expendable trusts or major capital projects) that are legally restricted to expenditures for specified purposes. Debt Service Funds account for the accumulation of property taxes and other revenue for periodic payment of interest and principal of general obligation and certain lease revenue bonds and related authorized costs.

Other City funds not included in these tables are Capital Project Funds, the Proprietary Funds which consist of enterprise and internal service funds and Fiduciary Funds which consist of pension trust and nonexpendable trust, expendable, and agency trust funds. These are funds whose uses are much more restricted than those which are included.

The Annual Financial Report for 1992 includes a table of General Revenues by Source, which shows a total revenue of $1.7 billion. The major sources are property taxes ($517 million), and grants and subventions ($541 million). These two together represent more than 63 percent of the total revenues. The third and fourth largest are other local taxes (16 percent) and business taxes (9 percent). Charges for services; licenses, fines and penalties; interest and investment earnings; and other add the remaining 12 percent.

These revenue data adjusted by inflation (1981 dollar value) total $1.091 billion for 1993, an increase of 33 percent since 1981. During

this period, 1984 showed the only decline (9.2 percent), mainly due to a reduction of grants and subventions. Over the 1980s, the proportion of revenues from grants and subventions has declined from 40 percent to 32 percent of the total budget. This decline has been offset by the increase in property taxes of more than 80 percent since 1981. Property taxes contributed 23 percent of the total budget in 1981; this share grew to 31 percent in 1987, and since then remained the same.

For the year ended June 30, 1992, total City and County expenditures were $1.436 billion. Of this total, 32 percent went to public protection, 22 percent to human welfare and neighborhood development, 16 percent to community health, and the remaining 30 percent to general administration and finance; culture and recreation; public works, transportation, and commerce; and debt service.

Looking at expenditure figures in constant dollar value (adjusted to the 1981 dollar value), there was a 43 percent increase in expenditures from 1981 to 1992. During this 12 year period, 1985 and 1987 had the largest increases of 8.2 percent each year. The function that showed the largest increase was debt service, which more than doubled. Human welfare and neighborhood development is the only function to experience a decrease.

Table 3.3.9

(1) Includes General, Special Revenues, and Debt Service Funds.

(2) Information for the years 1982 through 1992 has been adjusted to the 1981 value of the dollar, using the Consumer Price Index-Urban.

GENERAL REVENUES BY SOURCE-CONSTANT DOLLAR VALUE(1)(2)
1981-1992 Fiscal Years, (In $1000)

Fiscal Year	Property Taxes	Business Taxes	Other Local Taxes	Grants & Subvention	Licences Fines & Penalties	Interest & Investment Earnings	Charges for Service	Other	Total
1981	186,415	58,773	125,872	329,786	28,872	33,192	58,230	1,385	822,525
1982	189,931	95,898	146,969	293,077	28,490	30,363	77,356	10,948	873,032
1983	211,856	91,544	129,540	274,673	27,465	45,529	86,689	9,338	876,634
1984	213,865	86,234	130,849	234,434	26,856	38,667	57,973	7,375	796,253
1985	239,026	79,535	141,367	244,295	24,594	30,986	60,049	5,047	824,899
1986	266,409	90,538	150,293	252,376	29,911	30,076	64,249	5,571	889,423
1987	280,561	89,988	159,771	239,620	31,365	23,051	75,375	7,457	907,188
1988	294,401	92,477	168,461	268,053	34,869	19,833	60,550	8,783	947,427
1989	300,960	104,726	168,667	266,311	37,078	22,316	59,820	10,190	970,068
1990	322,670	107,305	161,356	312,771	35,445	22,350	64,099	9,017	1,035,013
1991	326,730	105,855	184,049	304,122	33,911	21,292	62,731	11,644	1,050,334
1992	338,112	93,110	178,136	353,359	36,848	19,724	63,105	9,395	1,091,789

Percentage Distribution By Revenue Source

Fiscal Year	Property Taxes	Business Taxes	Other Local Taxes	Grants & Subvention	Licences Fines & Penalties	Interest & Investment Earnings	Charges for Service	Other	Total
1981	23	7	15	40	4	4	7	0	100
1982	22	11	17	34	3	4	9	1	100
1983	24	10	15	31	3	5	10	1	100
1984	27	11	16	29	3	5	7	1	100
1985	29	10	17	30	3	4	7	1	100
1986	30	10	17	28	3	3	7	1	100
1987	31	10	18	26	4	3	8	1	100
1988	31	10	18	28	4	2	6	1	100
1989	31	11	17	28	4	2	6	1	100
1990	31	10	16	30	3	2	6	1	100
1991	31	10	18	29	3	2	6	1	100
1992	31	9	16	32	3	2	6	1	100

Percentage Change

Fiscal Year	Property Taxes	Business Taxes	Other Local Taxes	Grants & Subvention	Licences Fines & Penalties	Interest & Investment Earnings	Charges for Service	Other	Total
1981-1982	2	63	17	-11	-1	-9	33	691	6
1982-1983	12	-5	-12	-6	-4	50	12	-15	0
1983-1984	1	-6	1	-15	-2	-15	-33	-21	-9
1984-1985	12	-8	8	4	-8	-20	4	-32	4
1985-1986	12	14	6	3	22	-3	7	10	8
1986-1987	5	-1	6	-5	5	-23	17	34	2
1987-1988	5	3	5	12	11	-14	-20	18	4
1988-1989	2	13	0	-1	6	13	-1	16	2
1989-1990	7	3	-4	17	-4	0	7	-12	7
1990-1991	1	-1	14	-3	-4	-5	-2	29	2
1991-1992	3.5	-12	-3	16	9	-7	1	-19	4

GENERAL REVENUES BY SOURCE (1)
1992 Fiscal Year, (In $1000, Unadjusted)

	Property Taxes	Business Taxes	Other Local Taxes	Grants & Subvention	Licences Fines & Penalties	Interest & Investment Earnings	Charges for Service	Other	Total
Total	517,312	142,458	272,548	540,639	56,377	30,177	96,551	14,375	1,670,437
Percent	31	8.5	16.3	32.3	3.4	1.8	5.8	0.9	100

Source: Department of City Planning
Office of the Controller

Table 3.3.10

GENERAL GOVERMENTAL EXPENDITURES BY FUNCTION CONSTANT DOLLAR VALUE(1)(2)
1981-1992 Fiscal Years, ($1,000)

Fiscal Year	Public Protection	Pub Works, Transp. & Commerce	Human Welfare & Neigh.Devt	Community Health	Culture & Recreation	Gral. Administ. & Finance	Debt Service	Total
1981	235,222	33,755	196,757	80,865	42,376	48,979	17,499	655,453
1982	275,752	43,521	181,163	99,002	47,968	64,061	16,401	727,868
1983	271,168	41,247	177,187	104,340	62,626	78,537	21,396	756,501
1984	292,441	45,216	168,678	71,910	63,605	62,449	23,223	727,522
1985	307,684	47,218	172,333	83,474	67,430	87,585	21,691	787,415
1986	311,048	46,588	171,870	91,373	70,129	67,516	21,256	779,780
1987	324,958	51,971	181,943	97,244	76,341	91,340	19,979	843,776
1988	322,670	51,166	181,117	102,068	77,422	96,375	24,111	854,929
1989	309,744	46,108	180,460	100,387	74,422	98,608	23,806	833,535
1990	318,235	53,309	193,845	115,413	82,433	90,601	36,226	890,062
1991	319,321	55,979	205,818	131,523	81,255	99,568	46,579	940,043
1992	297,390	63,354	206,958	151,864	75,405	100,908	42,371	938,248

Percentage Distribution By Function

Fiscal Year	Public Protection	Pub Works, Transp. & Commerce	Human Welfare & Neigh.Devt	Community Health	Culture & Recreation	Gral. Administ. & Finance	Debt Service	Total
1981	36	5	30	12	7	8	3	100
1982	38	6	25	14	7	9	2	100
1983	36	6	23	14	8	10	3	100
1984	40	6	23	10	9	9	3	100
1985	39	6	22	11	9	11	3	100
1986	40	6	22	12	9	9	3	100
1987	39	6	22	12	9	11	2	100
1988	38	6	21	12	9	11	3	100
1989	37	6	22	12	9	12	3	100
1990	36	6	22	13	9	10	4	100
1991	34	6	22	14	9	11	5	100
1992	32	7	22	16	8	11	5	100

Percentage Change

Fiscal Year	Public Protection	Pub Works, Transp. & Commerce	Human Welfare & Neigh.Devt	Community Health	Culture & Recreation	Gral. Administ. & Finance	Debt Service	Total
1981-1982	17	29	-8	22	13	31	-6	11
1982-1983	-2	-5	-2	5	31	23	31	4
1983-1984	8	10	-5	-31	2	-21	9	-4
1984-1985	5	4	2	16	6	40	-7	8
1985-1986	1	-1	-0	10	4	-23	-2	-1
1986-1987	5	12	6	6	9	35	-6	8
1987-1988	-1	-2	-1	5	1	6	21	1
1988-1989	-4	-10	-0	-2	-4	2	-1	-3
1989-1990	3	16	7	15	11	-8	52	7
1990-1991	0.3	5	6.2	14	-1	10	29	6
1991-1992	-7	13	0.5	16	-7	1	-9	-0.2

GENERAL GOVERMENTAL EXPENDITURES BY FUNCTION (1)
1992 Fiscal Year, ($1,000, Unadjusted)

	Public Protection	Pub Works, Transp. & Commerce	Human Welfare & Neigh.Devt	Community Health	Culture & Recreation	Gral Administ. & Finance	Debt Service	Total
Total	455,007	96,931	316,645	232,352	115,369	154,389	64,827	1,435,520
Percent	31.7	6.7	22.1	16.2	8.0	10.8	4.5	100

Source: Department of City Planning
Office of the Controller

(1) Includes General, Special Revenues, and Debt Service Funds.

(2) Information for the years 1982 through 1992 has been adjusted to the 1981 value of the dollar, using the Consumer Price Index-Urban.

3.3.4 NON-PROFIT ORGANIZATIONS

This section presents revenue data on non-profit organizations located in San Francisco. They complement the establishment section, which lists the number of organizations following the same format. As indicated previously, these data come from the University of San Francisco's Non-profit organization database. Included in this list are all organizations recorded as "nonprofit" by the California Secretary of State recorded, as "tax-exempt" by the Internal Revenue Service and the California State Franchise Tax Board, and that received less than half of their income from market sales or government.

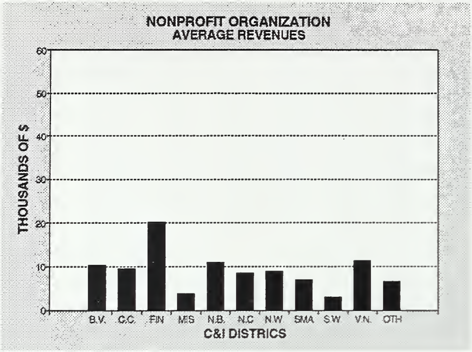
This data set is grouped by Land Use Activity and Commerce and Industry Districts (See Data Formats for detailed explanation, page 3). It describes average revenues per organization by Commerce and Industry district for each Land Use. Data from the table are also presented as graphs for a more visual comparison of average revenues. The average revenue for a nonprofit organization citywide was $569,000. The highest average revenue per organization among all Land Use Activities were found within the Office

Table 3.3.11

NONPROFIT ORGANIZATIONS BY C&I DISTRICT AND LAND USE ACTIVITY
Average revenues (Dollars)
1993

LANDUSE	Cult.\Inst.	Hotel	Office	Indust	Retail	No Sic	Total
DISTRICTS							
Bay View	2,084,748	5,762,576	4,218,365	—	—	114,853	648,454
Civic Center	11,309,299	1,913,831	9,052,817	99,743	—	253,941	591,717
Financial	43,220,394	542,014	32,672,052	69,075	204,373	3,211,166	1,258,628
Mission	3,471,219	115,237	4,490,786	367,446	—	184,628	239,022
North Beach	25,339,319	506,756	16,964,066	919,478	—	714,879	685,883
Nrth Central	18,843,043	1,134,214	14,764,390	452,188	277,259	1,478,588	534,330
North West	13,448,856	362	15,049,333	42,863	—	42,146	559,904
SOMA	10,345,160	1,543,475	11,332,494	1,145,582	—	611,883	438,433
South West	9,121,181	5,484,164	32,519,490	458,935	—	5,713,809	186,656
Van Ness	7,075,429	121,339	9,821,161	8,452	695,471	1,392,989	703,470
Others	121,293	5,608,783	1,145,871	1,768	—	189,644	408,981
TOTAL	13,125,449	2,066,614	13,820,984	324,139	107,009	1,264,411	568,680

Source: Department of City Planning
University of San Francisco



Graph 3.3.3

category. Nonprofit organizations classified within the Office Land Use Activity showed an average of $13.8 million of revenues per organization. This was followed by Cultural/Institutional organizations which had an average of $13.1 million, within a range per district of 2 (Bay View) to 43 (Financial) million dollars. All other Land Use activities showed citywide averages of less than $2 million.

Among all Commerce and Industry districts, the Financial district showed the highest average revenue of $1.3 million per organization.

3.4 BUILDING AND LAND USE

3.4.1 BUILDING PERMIT APPLICATIONS, 1983-1992

The data in this section cover historical as well as current information about building permit applications and the cost of projects associated with these applications. The information was provided by the Bureau of Building Inspection (BBI). The first set of data includes all applications filed from 1983 to 1992 (i.e. an application filed in 1985 would be included under the 1985 data). The second set of data describe all the building permit activity during 1992. This includes any application filed, approved, cancelled or completed in that year. Since some applications are not approved, cancelled or completed the same year they are filed, this second set of data will include applications filed in previous years (i.e. an application filed in 1991 and approved in 1992 would be included in the 1992 data). These data are presented by Commerce and Industry District and Land Use activity (See Introduction, Data Formats, page 3). Mixed use projects are categorized according to the predominant use.

Construction work in the city consists of construction of new buildings, demolition, and alterations to existing structures. The number of building permit applications indicates the number of projects and/or sites. The construction value measures the size of those projects. The historical data are presented in 1983 constant dollars, based on the Saylor Inc. Indexes for material and labor. Construction value is the estimated construction cost for each application reviewed by BBI. It is important to look at both indicators because in some cases applications indicate only a nominal construction cost ($1), for example when an application is required to change the permitted use of a property but no construction is involved. Construction cost data include all projects applied for, not all construction actually carried out.

The different application statuses are grouped into four categories:
- Approved: refers to all applications that have been approved whether

Table 3.4.1

NUMBER OF APPLICATIONS BY LANDUSE AND YEAR

LANDUSE YEAR	Office	Retail	Indust	Hotel	Cult./Ins.	Resid	Other	Total
1983	1,719	1,703	227	262	253	8,034	2	12,200
1984	1,719	1,940	298	227	260	8,237	268	12,949
1985	1,725	1,666	288	137	246	9,017	529	13,608
1986	1,842	1,330	213	72	213	10,385	702	14,757
1987	2,146	1,439	243	77	255	10,650	604	15,414
1988	2,305	1,940	346	101	298	12,896	593	18,479
1989	2,396	1,773	270	104	305	16,219	1,128	22,195
1990	2,448	1,690	401	124	279	16,379	552	21,873
1991	2,056	1,372	230	63	207	13,121	223	17,272
1992	2,434	1,701	259	52	350	14,738	23	19,557

NUMBER OF APPLICATIONS BY LAND USE AND YEAR
Percentage distribution by land use

LANDUSE YEAR	Office	Retail	Indust	Hotel	Cult.Ins.	Resid	Other	Total
1983	14.1	14.0	1.9	2.1	2.1	65.9	0.0	100
1984	13.3	15.0	2.3	1.8	2.0	63.6	2.1	100
1985	12.7	12.2	2.1	1.0	1.8	66.3	3.9	100
1986	12.5	9.0	1.4	0.5	1.4	70.4	4.8	100
1987	13.9	9.3	1.6	0.5	1.7	69.1	3.9	100
1988	12.5	10.5	1.9	0.5	1.6	69.8	3.2	100
1989	10.8	8.0	1.2	0.5	1.4	73.1	5.1	100
1990	11.2	7.7	1.8	0.6	1.3	74.9	2.5	100
1991	11.9	7.9	1.3	0.4	1.2	76.0	1.3	100
1992	12.4	8.7	1.3	0.3	1.8	75.4	0.1	100

NUMBER OF APPLICATIONS BY LAND USE AND YEAR
Percentage annual change

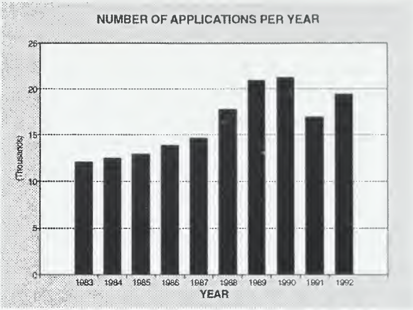
LANDUSE YEAR	Office	Retail	Indust	Hotel	Cult./Ins.	Resid	Other	Total
1983-84	0.0	13.9	31.3	-13.4	2.8	2.5	99.2	6.1
1984-85	0.3	-14.1	-3.4	-39.6	-5.4	9.5	97.4	5.1
1985-86	6.8	-20.2	-26.0	-47.4	-13.4	15.2	32.7	8.4
1986-87	16.5	8.2	14.1	6.9	19.7	2.6	-14.0	4.5
1987-88	7.4	34.8	42.4	31.2	16.9	21.1	-1.8	19.9
1988-89	3.9	-8.6	-22.0	3.0	2.3	25.8	90.2	20.1
1989-90	2.2	-4.7	48.5	19.2	-8.5	1.0	-51.1	-1.5
1990-91	-16.0	-18.8	-42.6	-49.2	-25.8	-19.9	-59.6	-21.0
1991-92	18.4	24.0	12.6	-17.5	69.1	12.3	-89.7	13.2

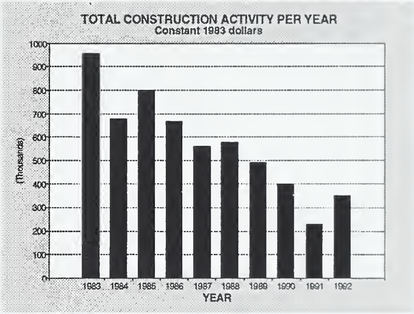
Source: Department of City Planning
Bureau of Building Inspection

or not the permit has been issued. (It does not include projects where construction is completed.)

- Cancelled: includes applications that have been cancelled, withdrawn, revoked, or disapproved. Disapproved is a very small percentage in this group.
- Completed: includes applications where the authorized construction work has been completed.

Graph 3.4.1





- Other : includes applications which have not yet been acted upon, which have been abandoned, reinstated, appealed, or with no information.

The number of applications filed from 1983 to 1992 has increased about 60 percent, from 12,000 to 20,000 (Table 3.4.1). At the same time, the volume of construction cost declined more than 60 percent (Table 3.4.2) which indicates that the average size of proposed projects has been reduced by more than 70 percent. The largest number of applications was filed in 1989 and 1990 while the largest volume of construction cost was found in 1983 with almost a constant decline since then.

3.4.1.1 Construction Activity by Land Use, 1983-1992

The Residential category included the largest number of building permit applications and the second largest volume of construction cost city wide, after Office. Residential applications increased their share of total permit applications from 66 percent in 1983 to 75 percent in 1992. During this period of time, the number of Residential and Office applications increased about 80 and 40 percent while their total

Table 3.4.2

CONSTRUCTION COST OF APPLICATIONS BY LAND USE AND YEAR
Adjusted by inflation LSI Index, 1983=100 (In thousands dollars)

LANDUSE YEAR	Office	Retail	Hotel	Indust	Cult./Ins.	Resid	Other	Total
1983	444,951	69,945	104,059	35,429	25,526	277,367	17	957,293
1984	246,207	56,802	110,016	34,357	18,667	210,410	1,132	677,591
1985	299,294	79,110	131,796	42,150	56,128	187,978	4,190	800,648
1986	178,023	71,367	35,569	49,544	28,282	304,260	1,321	668,368
1987	174,639	61,022	8,526	23,330	15,643	278,015	1,187	562,362
1988	186,313	108,256	24,304	21,595	17,687	217,364	1,565	577,085
1989	176,718	57,079	4,731	9,195	15,528	217,826	10,257	491,334
1990	160,160	38,974	7,348	8,105	10,298	167,492	6,306	398,683
1991	107,016	23,075	1,395	3,958	5,408	89,043	704	230,598
1992	138,802	50,192	7,383	9,290	32,591	112,421	195	350,874

CONSTRUCTION COSTS BY LAND USE AND YEAR
Percentage distribution

LANDUSE YEAR	Office	Retail	Hotel	Indust	Cult./Ins.	Resid	Other	Total
1983	48.5	7.3	10.9	3.7	2.7	29.0	0.0	100
1984	36.3	8.4	18.2	5.1	2.8	31.1	0.2	100
1985	37.4	9.9	18.5	5.3	7.0	23.5	0.5	100
1986	26.6	10.7	5.3	7.4	4.2	45.5	0.2	100
1987	31.1	10.9	1.5	4.1	2.8	49.4	0.2	100
1988	32.3	18.8	4.2	3.7	3.1	37.7	0.3	100
1989	36.0	11.6	1.0	1.9	3.2	44.3	2.1	100
1990	40.2	9.8	1.8	2.0	2.6	42.0	1.6	100
1991	46.4	10.0	0.6	1.7	2.3	38.6	0.3	100
1992	39.6	14.3	2.1	2.6	9.3	32.0	0.1	100

CONSTRUCTION COSTS BY LAND USE AND YEAR
Percentage annual change

LANDUSE YEAR	Office	Retail	Hotel	Indust	Cult./Ins.	Resid	Other	Total
1983-84	-44.7	-18.8	5.7	-3.0	-26.9	-24.1	6759.5	-29.2
1984-85	21.6	39.3	19.8	22.7	200.7	-10.7	270.2	18.2
1985-86	-40.5	-9.8	-73.0	17.5	-49.6	61.9	-68.5	-16.5
1986-87	-1.9	-14.5	-76.0	-52.9	-44.7	-8.6	-10.2	-15.9
1987-88	6.7	77.4	185.1	-7.4	13.1	-21.8	31.9	2.6
1988-89	-5.2	-47.3	-80.5	-57.4	-12.2	0.2	555.5	-14.9
1989-90	-9.4	-31.7	55.3	-11.9	-33.7	-23.1	-38.5	-18.9
1990-91	-33.2	-40.8	-81.0	-51.2	-47.5	-46.8	-88.8	-42.2
1991-92	29.7	117.5	429.3	134.7	502.7	26.3	-72.4	52.2
1983-92	-68.8	-28.2	-92.9	-73.8	27.7	-59.5	1079.0	-63.3

Source: Department of City Planning
Bureau of Building Inspection

construction cost declined almost 60 and 70 percent respectively. While Office projects increased in number, their city wide share of all applications declined from 14 percent to 12.

From 1983 to 1990, the number of Retail applications as well as their associated construction cost fluctuated from year to year. Retail construction cost declined almost 30 percent from 1983 to 1992.

Hotel and Industrial land uses also showed a decline in the volume of construction cost over this ten year period. The largest number of Hotel applications and the highest associated construction cost were recorded from 1983 to 1985. After these three years there was a significant decline of 40 percent of applications and more than 90 percent in construction cost. Applications for Industrial projects remained relatively constant around 250, except for 1988 and 1990 when they increased to more than 340. The volume of Industrial construction cost increased from 1983 to 1986, but from 1986 to 1991 declined approximately 90 percent.

3.4.1.2 Construction Activity by Commerce and Industry Districts, 1983-1992

Tables 3.4.3 and 3.4.4 show the distribution of building permit applications and associated construction cost over the past ten years. The South West District accounted for the largest number of building permit applications within the city. These applications increased from 32 percent of total applications (4,000) in 1983 to 40 percent (8,000) in 1992. At the same time, the value of proposed construction generated in this District increased its share of the total from 10 percent in 1983 to 27 percent in 1992. An absolute increase in the value of construction within the South West District took place between 1984 and 1987, going from $75 million to $115 million (1983 constant dollars). After 1987, it declined to $63 million in 1992.

Over these ten years (1983-1992), the Financial and South of Market Districts represented the largest volume of construction cost within

Table 3.4.3

NUMBER OF APPLICATIONS BY C&I DISTRICTS AND YEAR
(in thousands)

YEAR	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
C&I DISTRICT										
Bay View	383	409	454	393	539	587	532	546	513	598
Civic Center	645	621	570	582	497	573	555	551	450	467
Financial	1,490	1,317	1,356	1,417	1,441	1,646	1,700	1,761	1,500	1,932
Mission	684	811	892	964	917	1,281	1,400	1,273	781	1,263
North Beach	488	469	564	517	603	682	635	535	541	603
North Central	1,814	1,663	1,847	1,851	1,973	2,258	3,114	3,386	2,404	2,699
North West	1,523	1,463	1,584	1,831	1,712	2,132	2,748	2,698	1,705	2,110
SOMA	1,127	1,235	1,242	1,380	1,473	1,896	1,956	2,015	1,580	1,714
South West	4,053	4,416	4,610	5,462	5,681	6,810	8,820	8,597	7,239	8,088
Van Ness	607	590	597	564	531	657	746	685	613	646
Total	12,814	12,994	13,716	14,961	15,367	18,522	22,206	22,047	17,326	20,120

NUMBER OF APPLICATIONS BY C&I DISTRICTS AND YEAR
Percentage distribution by C&I district

YEAR	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
C&I DISTRICT										
Bay View	3.0	3.1	3.3	2.6	3.5	3.2	2.4	2.5	3.0	3.0
Civic Center	5.0	4.8	4.2	3.9	3.2	3.1	2.5	2.5	2.6	2.3
Financial	11.6	10.1	9.9	9.5	9.4	8.9	7.7	8.0	8.7	9.6
Mission	5.3	6.2	6.5	6.4	6.0	6.9	6.3	5.8	4.5	6.3
North Beach	3.8	3.6	4.1	3.5	3.9	3.7	2.9	2.4	3.1	3.0
North Central	14.2	12.8	13.5	12.4	12.8	12.2	14.0	15.4	13.9	13.4
North West	11.9	11.3	11.5	12.2	11.1	11.5	12.4	12.2	9.8	10.5
SOMA	8.8	9.5	9.1	9.2	9.6	10.2	8.8	9.1	9.1	8.5
South West	31.6	34.0	33.6	36.5	37.0	36.8	39.7	39.0	41.8	40.2
Van Ness	4.7	4.5	4.4	3.8	3.5	3.5	3.4	3.1	3.5	3.2
Total	100	100	100	100	100	100	100	100	100	100

NUMBER OF APPLICATIONS BY C&I DISTRICTS AND YEAR
Percentage annual change

YEAR	1983-84	1984-85	1985-86	1986-87	1987-88	1988-89	1989-90	1990-91	1991-92
C&I DISTRICT									
Bay View	6.8	11.0	-13.4	37.2	8.9	-9.4	2.6	-6.0	16.6
Civic Center	-3.7	-8.2	2.1	-14.6	15.3	-3.1	-0.7	-18.3	3.8
Financial	-11.6	3.0	4.5	1.7	14.2	3.3	3.6	-14.8	28.8
Mission	18.6	10.0	8.1	-4.9	39.7	9.3	-9.1	-38.6	61.7
North Beach	-3.9	20.3	-8.3	16.6	13.1	-6.9	-15.7	1.1	11.5
North Central	-8.3	11.1	0.2	6.6	14.4	37.9	8.7	-29.0	12.3
North West	-3.9	8.3	15.6	-6.5	24.5	28.9	-1.8	-36.8	23.8
SOMA	9.6	0.6	11.1	6.7	28.7	3.2	3.0	-21.6	8.5
South West	9.0	4.4	18.5	4.0	19.9	29.5	-2.5	-15.8	11.7
Van Ness	-2.8	1.2	-5.5	-5.9	23.7	13.5	-8.2	-10.5	5.4
Total	1.4	5.6	9.1	2.7	20.5	19.9	-0.7	-21.4	16.1

Source: Department of City Planning
Bureau of Building Inspection

the city, representing more than 40 percent of the total activity in the city. However, in terms of number of applications they only represented 20 percent, fewer than South West, North Central, and North West. In most years the Financial District has shown higher construction cost figures (4 to 8 percent greater) than South of Market. In spite of having the largest share of construction cost city wide, these two Districts' shares of city wide construction cost have significantly declined from 1983 to 1992. The Financial District declined from $316 million, 32 percent of the total to $104 million, 27 percent of the total.

Table 3.4.4

CONSTRUCTION COSTS BY C&I DISTRICTS AND YEAR
Adjusted by inflation, LSI Index 1983=100 (in thousands dollars)

YEAR	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
C&I DISTRICT										
Bay View	25,410	33,934	48,997	9,534	29,461	18,190	11,079	10,797	4,836	8,981
Civic Center	80,464	99,366	42,668	26,518	22,060	17,389	15,828	11,704	6,627	19,847
Financial	315,838	191,143	204,226	113,160	101,477	117,370	106,686	88,049	66,262	104,406
Mission	11,422	21,507	21,905	20,967	16,392	22,720	28,740	14,736	6,205	8,069
North Beach	15,560	37,577	15,965	14,907	26,342	40,444	11,121	10,918	4,724	11,028
North Central	88,172	60,295	77,745	71,360	80,452	40,134	67,736	48,325	22,980	29,1[illegible]7
North West	39,237	28,977	49,996	52,794	31,846	27,109	39,397	32,248	12,392	35,255
SOMA	255,136	103,696	256,828	241,880	102,732	161,999	95,455	87,454	49,156	64,642
South West	98,925	75,677	68,711	100,079	115,097	106,064	87,231	73,661	45,745	63,552
Van Ness	58,728	25,769	11,752	14,365	26,100	12,652	20,087	13,869	5,697	8,621
Total	988,891	677,940	798,795	665,563	551,959	564,071	483,359	391,758	224,625	353,507

CONSTRUCTION COSTS BY C&I DISTRICTS AND YEAR
Percentage distribution

YEAR	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
C&I DISTRICT										
Bay View	2.6	5.0	6.1	1.4	5.3	3.2	2.3	2.8	2.2	2.0
Civic Center	8.1	14.7	5.3	4.0	4.0	3.1	3.3	3.0	3.0	1.4
Financial	31.9	28.2	25.6	17.0	18.4	20.8	22.1	22.5	29.5	26.5
Mission	1.2	3.2	2.7	3.2	3.0	4.0	5.9	3.8	2.8	2.8
North Beach	1.6	5.5	2.0	2.2	4.8	7.2	2.3	2.8	2.1	1.9
North Central	8.9	8.9	9.7	10.7	14.6	7.1	14.0	12.3	10.2	7.6
North West	4.0	4.3	6.3	7.9	5.8	4.8	8.2	8.2	5.5	5.6
SOMA	25.8	15.3	32.2	36.3	18.6	28.7	19.7	22.3	21.9	20.9
South West	10.0	11.2	8.6	15.0	20.9	18.8	18.0	18.8	20.4	26.8
Van Ness	5.9	3.8	1.5	2.2	4.7	2.2	4.2	3.5	2.5	4.3
Total	100	100	100	100	100	100	100	100	100	100

CONSTRUCTION COSTS BY C&I DISTRICTS AND YEAR
Percentage annual change

YEAR	1983-84	1984-85	1985-86	1986-87	1987-88	1988-89	1989-90	1990-91	1991-92	1983-92
C&I DISTRICT										
Bay View	33.5	44.4	-80.5	209.0	-38.3	-39.1	-2.5	-55.2	85.7	-64.7
Civic Center	23.5	-57.1	-37.9	-16.8	-21.2	-9.0	-26.1	-43.4	199.5	-75.3
Financial	-39.5	6.8	-44.6	-10.3	15.7	-9.1	-17.5	-24.7	57.6	-66.9
Mission	88.3	1.8	-4.3	-21.8	38.6	26.5	-48.7	-57.9	30.0	-29.4
North Beach	141.5	-57.5	-6.6	76.7	53.5	-72.5	-1.8	-56.7	133.4	-29.1
North Central	-31.6	28.9	-8.2	12.7	-50.1	68.8	-28.7	-52.4	26.7	-67.0
North West	-26.1	72.5	5.6	-39.7	-14.9	45.3	-18.2	-61.6	184.5	-10.1
SOMA	-59.4	147.7	-5.8	-57.5	57.7	-41.1	-8.4	-43.8	31.5	-74.7
South West	-23.5	-9.2	45.7	15.0	-7.8	-17.8	-15.6	-37.9	38.9	-35.8
Van Ness	-56.1	-54.4	22.2	81.7	-51.5	58.8	-31.0	-58.9	51.3	-85.3
Total	-31.4	17.8	-16.7	-17.1	2.2	-14.3	-19.0	-42.7	57.4	-64.3

Source: Department of City Planning
Bureau of Building Inspection

South of Market declined from $255 to $64 million (in 1983 constant dollars). The volume of construction cost declined at the same time that the number of applications in these two Districts increased by 30 percent, which indicates a decline in the size of projects. Civic Center is the only District that shows a decline (30 percent) in number of applications over these ten years.

3.4.1.3 Construction Activity by Land Use and Commerce and Industry Districts, 1992

As indicated before, the construction activity data for 1992 covered all active building permit applications filed, approved, cancelled, or completed during this year.

Tables 3.4.5 and 3.4.6, show a total of almost 23,000 building permit applications with a total construction cost of almost one billion dollars city wide. These data show that the geography of applications varies substantially from the geography of the estimated construction volume. The highest concentration of construction dollars was in the Financial District; but the highest concentration of building permit applications was in the West side of the city, where most applications were filed for residential projects, including remodeling. The Financial District contained 23 percent of the city wide construction value, although it only represents 10 percent of the total number of applications. This shows that projects in the Financial District were much larger in scale, with an average cost of $113,000.

Sixty four percent of the total number of applications came from the three Districts on the west side of the city; 40 percent from the South West District, 14 percent from North Central, and 10 percent from North West. The Districts which accounted for the smallest percentage of applications were Civic Center, North Beach/Chinatown, Bay View, and Van Ness, each with less than 3 percent of the City total.

After the Financial District, the second and third largest shares of the city-wide construction cost were in South of Market and South West with 21 percent and 17 percent respectively. The Districts showing the smallest shares of construction cost were Bay View, Mission, and North Beach/Chinatown with 3 percent or less each.

Residential Activity was the most significant Land Use activity, both in terms of number of applications and construction volume city wide,

with 75 percent of the total number of permit applications and 41 percent of proposed construction cost. It is also the predominant Activity in terms of number of applications and construction cost in every District except the Financial District, where residential applications accounted for less than 10 percent and the associated construction cost, 2 percent of District total. The other Land Use Activities (Office, Retail, Industrial, Cultural/Institutional, Hotel, Other), each accounted for 12 percent or less of the total number of permit applications city wide. Office Activities represented 12 percent of the total number of applications, but 21 percent of the total construction cost. Retail was the third largest Land Use activity in terms of number of permits, the fourth largest in construction cost with 9 percent of the total number of permits and 14 percent of the total construction.

Industrial Activity, not surprisingly, is the most concentrated Land Use activity. Almost 85 percent of all Industrial applications and construction costs were concentrated in the South of Market and Bay View Districts. Most of Hotel applications were in Civic Center. Hotel construction activity was concentrated in the Financial and South of Market Districts, which represented 87 percent of the total construction cost. Office Activity was also concentrated in the same two Districts, the Financial District and the South of Market, with 77 percent of Office applications and 82 percent of the total Office construction cost in those Districts. Residential applications were concentrated in South West District, where 50 percent of all residential permit applications were located. 78 percent of all residential permit applications were in three Districts: South West, North West, and North Central.

Cultural/Institutional and Retail activities are the least concentrated activities, as reflected in the 1992 building permit applications data. No District received more than 25 percent of the applications in either of these categories. There was some concentration of the construction cost for these two categories with 49 percent of Cultural/Institutional construction cost in Civic Center and 36 percent of Retail construction cost in the Financial District.

ACTIVE BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITY
1992

Table 3.4.5

LANDUSE	Office	Retail	Indust	Hotel	Cult./In	Resid	Other	Total
C&I DISTRICT								
Bay View	76	57	80	0	15	502	3	733
Civic Center	87	128	1	27	40	281	0	564
Financial	1,440	325	6	16	36	192	3	2,018
Mission	37	140	20	3	23	1,244	2	1,469
North Beach	77	148	3	8	21	432	3	692
North Central	108	216	1	6	85	2,683	2	3,101
North West	50	147	6	2	49	2,146	0	2,400
SOMA	682	340	194	11	60	675	6	1,968
South West	109	459	13	4	103	8,548	9	9,245
Van Ness	79	138	2	1	16	496	2	734
TOTAL	2,745	2,098	326	78	448	17,199	30	22,924

ACTIVE BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITY
Percentage distribution by land use activities
1992

LANDUSE	Office	Retail	Indust	Hotel	Cult./In	Resid	Other	Total
C&I DISTRICT								
Bay View	2.8	2.7	24.5	0.0	3.3	2.9	10.0	3.2
Civic Center	3.2	6.1	0.3	34.6	8.9	1.6	0.0	2.5
Financial	52.5	15.5	1.8	20.5	8.0	1.1	10.0	8.8
Mission	1.3	6.7	6.1	3.8	5.1	7.2	6.7	6.4
North Beach	2.8	7.1	0.9	10.3	4.7	2.5	10.0	3.0
North Central	3.9	10.3	0.3	7.7	19.0	15.6	6.7	13.5
North West	1.8	7.0	1.8	2.6	10.9	12.5	0.0	10.5
SOMA	24.8	16.2	59.5	14.1	13.4	3.9	20.0	8.6
South West	4.0	21.9	4.0	5.1	23.0	49.7	30.0	40.3
Van Ness	2.9	6.6	0.6	1.3	3.6	2.9	6.7	3.2
TOTAL	100	100	100	100	100	100	100	100

ACTIVE BUILDING APPLICATION BY C&I DISTRICTS AND LAND USE ACTIVITY
Percentage distribution by C&I districts
1992

LANDUSE	Office	Retail	Indust	Hotel	Cult./In	Resid	Other	Total
C&I DISTRICT								
Bay View	10.4	7.8	10.9	0.0	2.0	68.5	0.4	100
Civic Center	15.4	22.7	0.2	4.8	7.1	49.8	0.0	100
Financial	71.4	16.1	0.3	0.8	1.8	9.5	0.1	100
Mission	2.5	9.5	1.4	0.2	1.6	84.7	0.1	100
North Beach	11.1	21.4	0.4	1.2	3.0	62.4	0.4	100
North Central	3.5	7.0	0.0	0.2	2.7	86.5	0.1	100
North West	2.1	6.1	0.3	0.1	2.0	89.4	0.0	100
SOMA	34.7	17.3	9.9	0.6	3.0	34.3	0.3	100
South West	1.2	5.0	0.1	0.0	1.1	92.5	0.1	100
Van Ness	10.8	18.8	0.3	0.1	2.2	67.6	0.3	100
TOTAL	12.0	9.2	1.4	0.3	2.0	75.0	0.1	100

Source: Department of City Planning
Bureau of Building Inspection

Table 3.4.6

CONSTRUCTION COST BY C&I DISTRICTS AND LAND USE ACTIVITY
(in thousands of dollars)
1992

LANDUSE	Office	Retail	Indust	Hotel	Cult./Ins	Resid	Other	Total
C&I DISTRICTS								
Bay View	3,643	863	6,358	0	1,287	12,352	23	24,525
Civic Center	14,715	3,172	1	1,226	90,957	38,850	0	148,921
Financial	116,418	50,154	724	7,413	45,479	5,495	33	225,716
Mission	784	2,165	420	140	1,423	14,978	3	19,912
North Beach	3,439	3,700	44	141	2,560	20,131	258	30,272
North Central	5,793	3,795	11	873	5,305	54,094	10	69,880
North West	981	10,753	215	5	18,337	37,417	0	67,708
SOMA	53,533	39,426	13,467	8,791	6,217	81,008	1,668	204,109
South West	4,669	19,756	2,060	145	11,305	107,622	182	145,739
Van Ness	2,492	4,075	14	4	2,839	28,559	2	37,984
Total	206,466	137,857	23,314	18,737	185,709	400,505	2,178	974,767

CONSTRUCTION COST BY C&I DISTRICTS AND LAND USE ACTIVITY
Percentage distribution by land use activity
1992

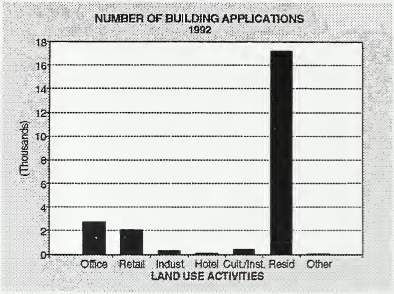
LANDUSE	Office	Retail	Indust	Hotel	Cult./In	Resid	Other	Total
C&I DISTRICTS								
Bay View	2	1	27	0	1	3	1	3
Civic Center	7	2	0	7	49	10	0	15
Financial	56	36	3	40	24	1	2	23
Mission	0	2	2	1	1	4	0	2
North Beach	2	3	0	1	1	5	12	3
NorthCentral	3	3	0	5	3	14	0	7
North West	0	8	1	0	10	9	0	7
SOMA	26	29	58	47	3	20	77	21
South West	2	14	9	1	6	27	8	15
Van Ness	1	3	0	0	2	7	0	4
Total	100	100	100	100	100	100	100	100

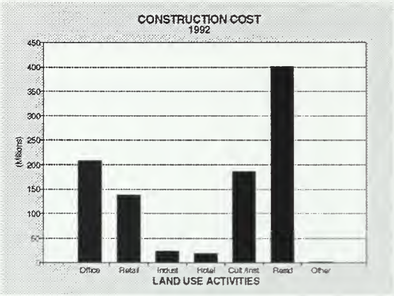
CONSTRUCTION COST BY C&I DISTRICTS AND LAND USE ACTIVITY
Percentage distribution by C&I districts
1992

LANDUSE	Office	Retail	Indust	Hotel	Cult./In	Resid	Other	Total
C&I DISTRICTS								
Bay View	15	4	26	0	5	50	0	100
Civic Center	10	2	0	1	61	26	0	100
Financial	52	22	0	3	20	2	0	100
Mission	4	11	2	1	7	75	0	100
North Beach	11	12	0	0	8	67	1	100
NorthCentral	8	5	0	1	8	77	0	100
North West	1	16	0	0	27	55	0	100
SOMA	26	19	7	4	3	40	1	100
South West	3	14	1	0	8	74	0	100
Van Ness	7	11	0	0	7	75	0	100
Total	21	14	2	2	19	41	0	100

Source: Department of City Planning
Bureau of Building Inspection

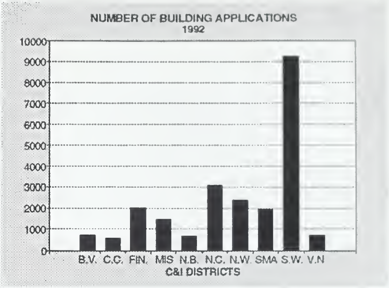
Graph 3.4.2

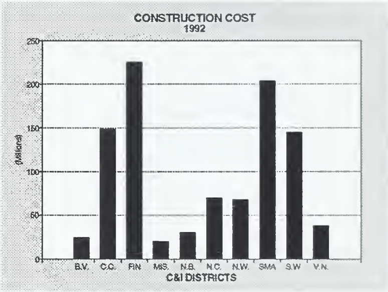




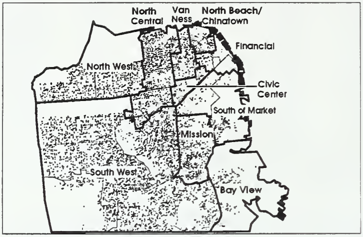
The pattern of distribution of construction cost among Districts varies from the distribution of applications. For example, 16 percent of all retail applications were received in the Financial District, but these applications represented about 36 percent of the total construction cost of retail applications. This shows that the scale and expense of these retail projects was substantially more than retail projects elsewhere in the City, and may be more likely to involve new construction than alterations to existing buildings. While the Financial District represented 21 percent of Hotel applications and Civic Center 35 percent, 40 percent of the total construction cost for hotels was for Financial District projects, and only 7 percent for Civic Center projects.

Graph 3.4.3

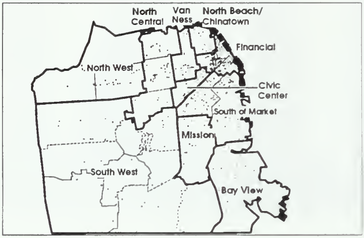

NUMBER OF BUILDING APPLICATIONS
1992
10000
9000
8000
7000
6000
5000
4000
3000
2000
1000
0
B.V. C.C. FIN. MIS N.B. N.C. N.W. SMA S.W. V.N
C&I DISTRICTS


CONSTRUCTION COST
1992
250
200
150
100
50
0
($Millions)
B.V. C.C. FIN. MIS. N.B. N.C. N.W. SMA S.W V.N.
C&I DISTRICTS

Map 3.4.1 BUILDING APPLICATIONS BY C&I DISTRICTS AND LAND USE, 1992

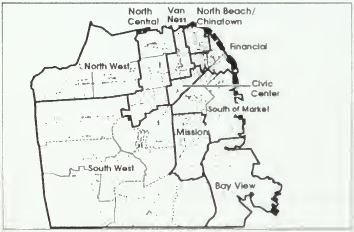


RESIDENTIAL



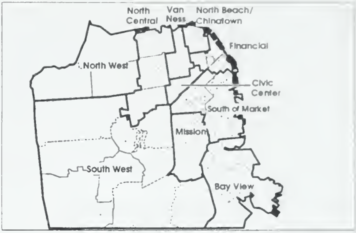
OFFICE

Maps presented have been generated using specific addresses. Each dot represents the location of the building application. On the Residential map, park areas or areas zoned for other activities are evident by the lack of dots. Retail corridors are indicated by the conCentration of dots along certain streets.

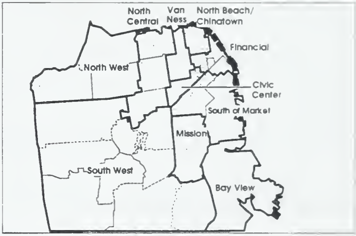


RETAIL

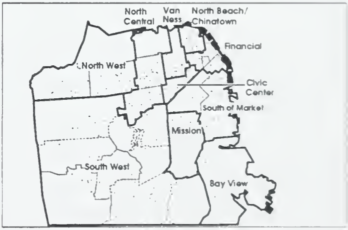
INDUSTRIAL



HOTEL



CULTURAL/ INSTITUTIONAL



3.4.1.4 Application Status

The status of applications gives an indication of the likelihood of projects applied for in any year to be completed. During uncertain economic times we might expect to see an increase in projects withdrawn, or in projects which are approved, but never completed. The number of completed projects is also a more precise measure of the amount of money spent on construction in any year, and of the number of projects being readied for occupancy, than is the number of applications filed.

Table 3.4.7

BUILDING APPLICATION BY APPLICATION STATUS AND LAND USE ACTIVITIES
1992

	Office	Retail	Indust	Hotel	Cult./Inst	Resid	Other	TOTAL
Approved	1,564	1,143	189	45	297	9,174	297	12,709
Cancelled+	107	206	30	12	31	905	31	1,322
Completed	968	604	95	16	91	5,870	91	7,735
Other	105	147	14	4	28	1,205	105	1,608
TOTAL	2,744	2,100	328	77	447	17,154	524	23,374

BUILDING APPLICATIONS BY APPLICATION STATUS AND LAND USE ACTIVITY
Percentage distribution by application status
1992

	Office	Retail	Indust	Hotel	Cult./Inst	Resid	Other	TOTAL
Approved	57.0	54.4	57.6	58.4	66 4	53 5	56.7	54 4
Cancelled+	3.9	9.8	9.1	15.6	6.9	5.3	5.9	5.7
Completed	35.3	28.8	29.0	20.8	20.4	34.2	17 4	33 1
Other	3.8	7.0	4.3	5.2	6.3	7.0	20.0	6 9
TOTAL	100	100	100	100	100	100	100	100

BUILDING APPLICATIONS BY APPLICATION STATUS AND LAND USE ACTIVITY
Percentage distribution by land use activity
1992

	Office	Retail	Indust	Hotel	Cult./Inst	Resid	Other	TOTAL
Approved	12.3	9.0	1.5	0.4	2.3	72 2	2 3	100
Cancelled+	8.1	15.6	2.3	0.9	2 3	68.5	2 3	100
Completed	12.5	7.8	1.2	0.2	1.2	75 9	1 2	100
Other	6.5	9.1	0.9	0.2	1.7	74 9	6 5	100
TOTAL	11.7	9.0	1.4	0.3	1.9	73 4	2 2	100

Source: Department of City Planning
Bureau of Building Inspection

Table 3.4.8

CONSTRUCTION COST OF BUILDING APPLICATIONS BY APPLICATION STATUS AND LAND USE ACTIVITY
(in thousands)
1992

	Office	Retail	Indust	Hotel	Cult./Inst	Resid	Other	TOTAL
Approved	154,218	113,287	15,344	17,509	181,629	243,151	2,092	727,231
Cancelled+	7,028	6,585	5,721	283	1,821	91,634	25	113,097
Completed	43,943	13,386	1,572	151	2,074	42,773	41	103,940
Other	1,305	4,602	1,257	14	130	11,431	20	18,759
TOTAL	206,494	137,861	23,893	17,957	185,654	388,990	2,178	963,027

CONSTRUCTION COST OF BUILDING APPLICATIONS BY APPLICATION STATUS AND LAND USE ACTIVITY
Percentage distribution by application status
1992

	Office	Retail	Indust	Hotel	Cult./Inst	Resid	Other	TOTAL
Approved	74.7	82.2	64.2	97.5	97.8	62.5	96 1	75 5
Cancelled+	3.4	4.8	23.9	1.6	1.0	23.6	1.2	11.7
Completed	21.3	9.7	6.6	0.8	1.1	11.0	1.9	10.8
Other	0.6	3.3	5.3	0.1	0.1	2.9	0.9	1.9
TOTAL	100	100	100	100	100	100	100	100

CONSTRUCTION COST OF BUILDING APPLICATIONS BY APPLICATION STATUS AND LAND USE ACTIVITY
Percentage distribution by land use activities
1992

	Office	Retail	Indust	Hotel	Cult./Inst	Resid	Other	TOTAL
Approved	21.2	15.6	2.1	2.4	25.0	33.4	0.3	100
Cancelled+	6.2	5.8	5.1	0.2	1.6	81.0	0.0	100
Completed	42.3	12.9	1.5	0.1	2.0	41.2	0.0	100
Other	7.0	24.5	6.7	0.1	0.7	60.9	0.1	100
TOTAL	21.4	14.3	2.5	1.9	19.3	40.4	0.2	100

Source: Department of City Planning
Bureau of Building Inspection

Application status has an element of time. Successful projects move from one category to another over time. First they are approved, then they remain in that category for a period of time until construction is completed. This amount of time varies considerably depending on the complexity of the project and the diligence with which it is pursued, but the number and cost of projects at early stages in the process is a good indicator of the amount of actual construction likely to occur in the near future.

In 1992, 54 percent of applications to Bureau of Building Inspection were approved (Table 3.4.7) in the course of the year but not completed, 33 percent were completed, 12 percent were cancelled or in other categories (abandoned, reinstated, appealed, etc.). Sixty-six percent of Cultural/Institutional applications were approved and 20 percent completed, while 54 percent of the Residential applications were approved and 34 percent completed. This may be because less time typically elapses between residential project approval and completion.

Seventy six percent of the total construction cost corresponded to approved applications and 11 percent to construction work completed (Table 3.4.8). While Residential Activities represent the highest percentage of applications approved, 72 percent, these same applications account for only 33 percent of the construction cost, again reflecting the lower average cost of Residential projects.

Tables 3.4.10 and 3.4.11 show building applications by Commerce and Industry District and application status. The South West District accounted for the greatest number of approved and completed projects, with 5,155 and 3,428 respectively. Thirty-eight percent of approved applications were from this District, and of the total completed projects city wide, the South West had 44 percent. However, this District has only 23 percent of the city wide construction cost for completed projects, indicating that the projects undertaken in this District are small scale, such as renovations or minor additions.

The Financial District accounts for approximately 9 and 10 percent of approved and completed projects respectively. However, this District has the greatest amount spent on construction. The approved projects accounted for 25 percent of the total spent for construction city wide, and the completed projects accounted for 31 percent of construction cost.

The Civic Center has the lowest percent of approved projects (2.5%), but it ranks second after the Financial District in construction cost. This indicates that these projects though few in number are large in scale.

Table 3.4.9

BUILDING APPLICATION BY C&I DISTRICTS AND APPLICATION STATUS
1992

	Approved	Cancelled+	Completed	Other	Total
Bay View	520	64	177	23	784
Civic Center	337	60	183	43	623
Mission	977	94	392	86	1,549
North Beach	411	45	178	102	736
North Central	1,777	192	1,033	256	3,258
North West	1,464	115	815	110	2,504
SOMA	1,184	161	688	117	2,150
South West	5,155	496	3,428	606	9,685
Van Ness	472	59	203	72	806
Financial	1,233	103	763	122	2,221
Total	13,530	1,389	7,860	1,537	24,316

BUILDING APPLICATION BY C&I DISTRICTS AND APPLICATION STATUS
Percentage distribution by C&I districts
1992

	Approved	Cancelled+	Completed	Other	Total
Bay View	3.8	4.6	2.3	1.5	3.2
Civic Center	2.5	4.3	2.3	2.8	2.6
Mission	7.2	6.8	5.0	5.6	6.4
North Beach	3.0	3.2	2.3	6.6	3.0
North Central	13.1	13.8	13.1	16.7	13.4
North West	10.8	8.3	10.4	7.2	10.3
SOMA	8.8	11.6	8.8	7.6	8.8
South West	38.1	35.7	43.6	39.4	39.8
Van Ness	3.5	4.2	2.6	4.7	3.3
Financial	9.1	7.4	9.7	7.9	9.1
Total	100	100	100	100	100

BUILDING APPLICATION BY C&I DISTRICTS AND APPLICATION STATUS
Percentage distribution by application status
1992

	Approved	Cancelled+	Completed	Other	Total
Bay View	66.3	8.2	22.6	2.9	100
Civic Center	54.1	9.6	29.4	6.9	100
Mission	63.1	6.1	25.3	5.6	100
North Beach	55.8	6.1	24.2	13.9	100
North Central	54.5	5.9	31.7	7.9	100
North West	58.5	4.6	32.5	4.4	100
SOMA	55.1	7.5	32.0	5.4	100
South West	53.2	5.1	35.4	6.3	100
Van Ness	58.6	7.3	25.2	8.9	100
Financial	55.5	4.6	34.4	5.5	100
Total	55.6	5.7	32.3	6.3	100

Source: Department of City Planning
Bureau of Building Inspection

Table 3.4.10

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICTS AND STATUS
(in thousands)
1992

	Approved	Cancelled+	Completed	Other	TOTAL
Bay View	20,224	2,855	1,649	515	25,243
Civic Center	143,721	2,289	2,288	287	148,585
Mission	14,959	1,794	2,455	606	19,814
North Beach	19,114	4,887	1,926	4,350	30,277
North Central	51,368	7,737	8,269	1,857	69,231
North West	44,647	4,464	10,559	663	60,333
SOMA	115,701	67,673	18,394	2,622	204,390
South West	103,177	15,572	23,704	3,143	145,596
Van Ness	33,266	1,451	2,674	630	38,020
Financial	184,848	4,467	32,434	4,171	225,920
TOTAL	731,024	113,187	104,353	18,845	967,410

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICTS AND STATUS
Percentage distribution by C&I district
1992

	Approved	Cancelled+	Completed	Other	TOTAL
Bay View	2.8	2.5	1.6	2.7	2.6
Civic Center	19.7	2.0	2.2	1.5	15.4
Mission	2.0	1.6	2.4	3.2	2.0
North Beach	2.6	4.3	1.8	23.1	3.1
North Central	7.0	6.8	7.9	9.9	7.2
North West	6.1	3.9	10.1	3.5	6.2
SOMA	15.8	59.8	17.6	13.9	21.1
South West	14.1	13.8	22.7	16.7	15.1
Van Ness	4.6	1.3	2 6	3.3	3.9
Financial	25.3	3.9	31.1	22.1	23.4
TOTAL	100	100	100	100	100

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICTS AND STATUS
Percentage distribution by application status
1992

	Approved	Cancelled+	Completed	Other	TOTAL
Bay View	80.1	11.3	6.5	2 0	100
Civic Center	96.7	1.5	1.5	0.2	100
Mission	75.5	9.1	12.4	3 1	100
North Beach	63.1	16.1	6 4	14 4	100
North Central	74.2	11.2	11.9	2 7	100
North West	74.0	7.4	17.5	1.1	100
SOMA	56.6	33.1	9.0	1.3	100
South West	70.9	10.7	16.3	2.2	100
Van Ness	87.5	3.8	7.0	1.7	100
Financial	81.8	2.0	14 4	1 8	100
TOTAL	75.6	11.7	10.8	1.9	100

Source: Department of City Planning
Bureau of Building Inspection

3.4.1.5 Average Construction Cost

Table 3.4.9 shows the 1992 average construction cost by Land Use Activity and by C&I District. By Land Use Activity, Cultural/Institutional activity had the highest average construction cost of $415,000. Average cost for Hotel and Industrial applications were the second and third highest with $240,000 and $76,000 respectively. Residential projects had the lowest average cost of $23,000.

Not surprisingly, the Districts with the bulk of the more expensive office and industrial projects have the highest average application costs. The Civic Center District shows the highest average of $264,000 per project, followed by the Financial District with $112,000 per project, and South of Market with $104,000 per project. The lowest averages are found in Districts on the West side of the city, where most of the residential projects were located.

Table 3.4.11

AVERAGE CONSTRUCTION COST BY BUILDING APPLICATIONS AND C&I DISTRICT
1992

	Construction Cost ($1,000)	Applications	Average Construction Cost/Application ($1,000)
Bay View	25,243	784	32.20
Civic Center	148,585	623	238.50
Mission	19,814	1,549	12.79
North Beach	30,277	736	41.14
North Central	69,231	3,258	21.25
North West	60,333	2,504	24.09
SOMA	204,390	2,150	95.07
South West	145,596	9,685	15.03
Van Ness	38,020	806	47.17
Financial	225,920	2,221	101.72
Total	967,410	24,316	39.78

AVERAGE CONSTRUCTION COST BY BUILDING APPLICATIONS BY LAND USE ACTIVITY
1992

	Construction Cost ($1,000)	Applications	Average Construction Cost/Application ($1,000)
Office	206,494	2,744	75.25
Retail	137,861	2,100	65.65
Industrial	23,893	328	72.84
Hotel	17,957	77	233.21
Cult./Inst.	185,654	447	415.33
Residential	388,990	17,154	22.68
Other	2,178	524	4.16
Total	963,027	23,374	41.20

Source: Department of City Planning
Bureau of Building Inspection

3.4.2 REAL ESTATE OFFICE SPACE

The information gathered in this section comes from three different sources: Cushman and Wakefield, Iliff Thorn, and TRI Commercial Brokerage. The commercial real estate firms collect data about office space using different criteria, calculation procedures, and district boundaries. They report square footage of office buildings leased and available for lease, vacancy rates, and the average rent by district over the past five to seven years. All three sources concentrate on the Financial District and the surrounding areas. Most sources distinguish the Northern from the Southern area of the Financial District, the first one being the traditional area of high-rise office towers and the second, the area for development and expansion of downtown offices. Additional Districts in real estate inventories include Union Square, Jackson Square, Northern Waterfront, Yerba Buena, and Van Ness.

The Cushman & Wakefield Inventory

This inventory includes all existing competitive buildings of 25,000 rentable square feet as well as significant buildings less than 25,000 square feet. It excludes government and medical buildings. Owner-occupied buildings were only included in the inventory until 1988. Since 1991, the office space data are reported in more geographic detail than in previous reports. The North Financial Area's data are disaggregated into the Northern Financial District, Jackson Square, and Northern Waterfront. The South of Market Area's data are also disaggregated into Southern Financial District, Yerba Buena, and South of Market. About 60 percent of this inventory's total office space was located in North Financial Area, 28 percent in South of Market Area, and 12 percent in Union Square and Van Ness.

Cushman & Wakefield Districts

These data shows a large increase (15 percent) of office space from 1985 to 1988, during the time when owner occupied buildings were included. Increase of office space after 1989 was very small and concentrated in the Southern Financial District. More than one million square feet of office space was added from 1989 to 1992. The Cushman & Wakefield report shows a vacancy rate citywide that

declined from 1986 to 1988, from 15.5 to 13.2 percent, and then increased to 13.7 percent in 1990. From 1990 to 1992, the citywide vacancy rate declined to 13 percent. Over the past four years, vacancy rates in the North Financial Area and South of Market Area declined while the vacancies in Union Square and Van Ness increased. In 1992, the highest vacancies were found in Yerba Buena and Union Square (20.3 and 16.7 percent), and the lowest in Northern Waterfront and Northern Financial District (7.4 and 12 percent).

RENTAL RATES: CUSHMAN & WAKEFIELD

	Fourth quarter 1992
North Financial Area	21.99
Northern Financial District	22.25
Jackson Square	20.71
North Waterfront	19.24
South of Market Area	18.12
Southern Financial District	18.22
Yerba Buena	17.98
South of Market	17.99
Union Square	13.94
Van Ness	17.96
Total	19.62

Source: Department of City Planning
Cushman & Wakefield

Rental rates are reported for direct space (net of sublease) and weighted by the amount of square footage available at each rental rate in different buildings. In 1992, the highest average rental rates was found in the North Financial Area ($21.99 per square foot) and the lowest in Union Square ($13.94 per square foot). The average rate for all the office space recorded by Cushman & Wakefield was $19.62 per square foot.

Table 3.4.12 OFFICE SPACE FOR SELECTED AREAS: CUSHMAN + WAKEFIELD

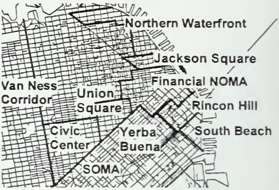
Office Space (1,000 sq. ft.)	1985	1986	1987	1988	1989	1990	1991	1992
North Financial Area	34,085	36,603	36,780	37,610	34,067	34,218	34,390	34,390
Northern Financial Dst	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	30,849	30,849
Jackson Square	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	1,202	1,202
North Waterfront	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	2,339	2,339
South of Market Area	11,230	12,886	15,130	15,856	15,115	15,224	16,069	16,248
Southern Financial Dst	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	9,588	9,731
Yerba Buena	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	1,067	1,067
South of Market	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	5,414	5,450
Union Square	3,465	3,394	3,540	3,708	3,454	3,596	3,598	3,641
Van Ness	6,273	6,654	6,382	6,401	4,196	3,861	3,508	3,647
Citywide	55,053	59,537	61,833	63,575	56,831	56,900	57,566	57,927

Vacany Rates	1985	1986	1987	1988	1989	1990	1991	1992
North Financial Area	9.0	9.5	8.8	9.0	9.5	13.6	12.6	11.8
Northern Financial Dst	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	12.8	12.0
Jackson Square	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	14.2	14.9
North Waterfront	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	9.3	7.4
South of Market Area	20.3	28.8	23.1	18.0	18.1	15.0	16.2	16.5
Southern Financial Dst	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	14.3	15.5
Yerba Buena	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	23.2	20.3
South of Market	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	18.1	13.5
Union Square	12.0	8.0	8.1	8.9	11.5	13.5	14.2	16.7
Van Ness	5.0	8.1	6.2	5.4	9.7	10.2	11.9	13.1
Citywide	12.3	15.5	13.4	13.2	13.5	13.7	13.6	13.0

Source: Department of City Planning
Cushman & Wakefield

The Iliff Thorn Inventory

This includes all buildings functioning primarily as Office and containing 20,000 square feet or more in the Financial District or 10,000 square feet or more in other Districts. Projects under construction or planned as well as sublease space are excluded. These data distinguish the Northern financial core (Financial NOMA) from the outlying areas with boundaries as indicated in the attached map. In 1992, this inventory accounted for more than 63 million square feet of office space citywide in 470 buildings.



Iliff Thorn Districts

This data set shows a very small growth of office space over the past three years, most of which happened outside of the Financial District. From 1990 to 1992, Union Square added 300 thousand square feet

Table 3.4.13

OFFICE SPACE FOR SELECTED AREAS: ILIFF THORN

Office space (1,000 sq. ft)	1986	1987	1988	1989	1990	1991	1992
Financial Dist.	39,440	40,376	41,753	41,748	42,632	42,799	42,858
NOMA	30,859	31,555	32,224	32,073	32,706	32,859	32,859
SOMA	8,781	8,821	9,528	9,675	9,925	9,939	9,998
Union Square	N.A.	N.A.	3,162	3,170	3,170	3,411	3,476
Jackson Square	1,574	1,646	1,726	1,780	1,801	1,866	1,866
South Beach	380	508	582	582	542	594	704
Rincon Hill	1,720	3,018	3,628	3,857	4,247	4,483	4,483
Yerba Buena	2,354	2,708	2,293	2,333	2,323	2,121	2,121
N. Waterfront	3,431	3,556	3,580	3,580	3,580	3,337	3,337
Van Ness	2,280	2,364	2,242	2,424	2,424	2,479	2,486
Civic Center	N.A.	N.A.	1,811	2,083	2,094	2,052	2,052
Total	51,179	54,176	60,777	61,557	62,812	63,141	63,382

Vacancy rates	1986	1987	1988	1989	1990	1991	1992
Financial Dist.	14.9	12.6	12.3	12.1	11.0	10.1	10.6
NOMA	14.2	12.7	12.8	12.2	11.9	10.6	10.9
SOMA	17.6	12.4	10.8	11.8	8.0	8.5	9.8
Union Square	NA	NA	6.7	9.7	7.8	10.6	12.1
Jackson Square	13.6	11.5	16.7	17.8	20.2	15.8	15.5
South Beach	1.7	15.4	13.7	11.0	19.9	15.3	16.4
Rincon Hill	12.7	41.2	25.9	22.0	14.7	9.4	8.3
Yerba Buena	8.8	16.5	7.6	8.7	7.0	8.7	11.8
N. Waterfront	9.8	7.2	5.2	5.1	11.7	7.5	5.0
Van Ness	9.9	16.4	10.2	8.3	3.4	4.9	7.0
Civic Center	NA	NA	13.3	23.6	14.2	12.0	8.2
Total	13.8	14.2	12.4	12.4	11.1	10.0	10.3

Source: Department of City Planning
Iliff Thorn

of office space to the real estate market. During the same period of time, the office space in Yerba Buena, Rincon Hill, and South Beach increased by almost 600 thousand square feet while the Financial District increased by 200 thousand square feet.

Vacancy rates, reported by Illif Thorn, in most Districts declined from 1986 to 1991. The average vacancy rate for the total inventory went from 14.2 in 1987 to 10 percent in 1991. From 1991 to 1992, the total vacancy rate went from 10 to 10.3 percent and the Financial District NOMA and SOMA increased from 10.6 and 8.5 to 10.9 and 9.8 respectively. In 1992, the highest vacancy rates were found in South Beach and Jackson Square (16.4 and 15.5 percent) and the lowest were in Northern Waterfront and Van Ness (5 and 7 percent).

RENTAL RATES:
ILLIF THORN

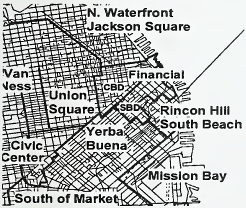
(Dollars per square foot)	1992
Financial Dist.	20.67
NOMA	21.23
SOMA	16.22
Union Square	14.81
Jackson Square	19.05
South Beach	15.15
Rincon Hill	18.94
Yerba Buena	17.06
N. Waterfront	18.14
Van Ness	19.61
Civic Center	13.55

Source: Department of City Planning
Iliff Thorn

The average rental rates reported by Illif Thorn show the highest rates in the Financial District North of Market ($21.23 per square foot), Van Ness ($19.61), and Jackson Square ($19.05). The lowest rates are found in Civic Center ($13.55) and South Beach ($15.15).

The TRI Commercial Brokerage Inventory

This inventory includes most large buildings including owner occupied, as well as projects that will be available for occupancy within the following six months. This inventory covers data from 1988 to 1992. TRI's Districts divide the Financial District into Central Business District, CBD (North of Market area), and South Business District (between Market and Folsom Streets). Data for the South of Market District is combined with "Outlying Areas" which includes Civic Center, Van Ness Corridor, and Executive Park. In 1992, 514 buildings were included in the inventory accounting for 64.5 million square feet.



TRI Districts

The total office space recorded by TRI increased from 1988 to 1990 to 67 million square feet and then declined to 64 million square feet in 1992 (several buildings were taken off the market due to earthquake damage or asbestos removal). These changes were mainly driven by the Financial District. The Central Business District provides more than three times the office space of the South Business District and more than five times the space of the South of Market District.

The overall vacancy rate for the total inventory has declined since 1988. The Central Business District vacancy rate declined from 14 percent in 1990 to 11.9 in 1992. The South Business District declined from 13.6 percent in 1988 to 9.5 in 1991 and increased in 1992 to 14.7. The Jackson Square/Northern Waterfront area showed the greatest vacancy rate decline from 1988 (23.5 percent) to 1992 (7.7 percent).

In 1992, TRI reported a citywide rental rate of $20.73 per square feet. The highest rental rates were recorded in the Central Business District ($22.87) and Showplace Square ($20.16), while the lowest were found in Union Square ($15.31) and South of Market District and Outlying Areas ($16.29).

RENTAL RATES:
TRI COMMERCIAL BROKER
(Dollars per square foot)

	Fourth quarter 1992
Financial District	22.10
Central Business District	22.87
South Business District	20.09
Rincon Hill	17.36
South Beach	19.79
Showplace Square	20.16
SOMA/Outlying Areas	16.29
Yerba Buena	17.77
Mission Bay	18.50
Union Square	15.31
Jackson Square/N. Waterfront	19.45
Citywide	20.73

Source: Department of City Planning
Tri Commercial Brokerage

Table 3.4.14

OFFICE SPACE FOR SELECTED AREAS: TRI COMMERCIAL BROKER

Office space (in thousands square feet)	1988	1989	1990	1991	1992
Fnancial District	41,289	41,880	47,308	43,077	42,378
Central Business District	32,182	32,477	34,177	33,062	32,477
South Business District	9,107	9,403	13,131	10,015	9,901
Rincon Hill	3,740	4,032	986	4,141	3,792
South Beach	139	139	357	167	167
Showplace Square	150	250	332	345	345
SOMA/Outlying Areas	6,762	6,877	7,731	7,450	6,350
Yerba Buena	2,786	2,786	2,535	2,731	2,731
Mission Bay	681	681	881	881	881
Union Square	2,437	2,664	2,141	2,863	2,863
Jackson Square/N. Waterfront	4,625	4,688	4,946	4,961	4,961
Citywide	63,415	64,782	67,221	66,610	64,471

Vacancy rates	1987	1988	1989	1990	1991	1992
Financial District	N.A.	N.A.	N.A.	12.9	12.2	12.5
Central Business District	N.A.	13.1	13.1	14.0	13.0	11.9
South Business District	N.A.	13.6	13.1	10.0	9.5	14.7
Rincon Hill	N.A.	27.0	28.6	15.5	17.1	13.5
South Beach	N.A.	9.0	22.3	15.5	30.3	26.6
Showplace Square	N.A.	N.A.	8.0	17.0	16.9	22.0
SOMA/Outlying Areas	N.A.	N.A.	N.A.	5.8	6.4	7.0
Yerba Buena	N.A.	11.0	7.7	8.6	9.0	9.0
Mission Bay	N.A.	27.0	23.5	37.5	44.3	36.9
Union Square	N.A.	7.2	14.3	12.4	10.8	10.0
Jackson Square/N. Waterfront	N.A.	23.5	23.0	15.8	15.0	7.7
Citywide	12.6	13.3	13.3	12.5	12.4	11.9

Source: Department of City Planning
Tri Commercial Brokerage

3.4.2 LAND USE

While the building permit application data described above indicate additions and changes of building space under construction, this section presents an overview of the existing land use and building space within the city. The land use data included in this second Inventory are significantly improved over last year's report which only covered one percent of the City's parcels. This Inventory covers information about on 80 percent of all parcels in the city. It describes lot area, type of use, and building space, as recorded by the Office of the Assessor at the end of 1992. Subsequent Inventories will continue updating the land use information as new data are gathered by the Department of City Planning through area plan surveys.

3.4.2.1 Land Use

The Office of the Assessor's data used in this report are organized by Assessors Lot and describe land, building area, and use. The land and building use are assigned based on the predominant use of the lot according to the Assessor's use class designations. This information is presented by Commerce and Industry Districts and Land Use Activities. Because the Assessor's data includes census tract information, the C&I District boundaries vary slightly from those in the rest of this inventory which are defined by zip code. Land Use Activities group the Assessor's use class designations into the seven main categories used throughout this inventory (See Introduction for detailed information).

Although this is the most comprehensive and current land use data available, there is information missing as shown in Table 3.4.14. Two percent of the lots in the city did not have building square footage information and 12 percent did not have lot area information. A significant proportion of Hotel and Residential uses had missing information especially in the Financial and Van Ness

Districts. When using these data it should be noted that the Assessor's Office has not updated many parcel records for several years. Summaries presented in this year's report may not match the current land use.

The intent is to systematically update this information as more details are gathered through area plan updates and computerized tracking of permits in the future.

Table 3.4.14

MISSING BUILDING SQ.FT. DATA BY NUMBER OF LOTS
Percentage

LANDUSE DISTRICTS	Office	Retail	Indust	Hotel	Cult./Inst.	Resid	Govmt	Other	No L.use	All Uses
Bay View	6.1	0.7	1.0	0.0	0.0	0.3	8.3	1.9	97.8	2.0
Civic Center	3.1	1.3	0.0	0.5	0.0	6.5	0.0	4.2	100.0	5.2
Financial	1.4	1.0	9.7	94.5	0.0	2.3	0.0	8.1	100.0	34.6
Mission	0.0	0.0	1.0	0.0	0.0	0.0	0.0	3.9	100.0	0.5
North Beach	0.0	1.4	0.0	0.0	0.0	1.6	0.0	10.0	100.0	2.3
North Central	0.0	0.4	6.7	0.0	0.0	0.3	0.0	4.7	95.0	1.0
North West	0.0	0.0	0.0	0.0	0.9	0.0	0.0	4.2	100.0	0.1
SOMA	0.8	0.5	0.3	1.0	0.0	0.3	4.2	5.1	98.9	3.1
South West	0.0	0.9	1.5	0.0	1.2	0.0	1.6	3.5	76.0	0.2
Van Ness	0.0	0.4	0.0	0.0	0.0	5.5	0.0	2.2	98.2	5.9
Citywide	1.0	0.7	0.7	71.3	0.5	0.4	2.0	4.1	96.1	2.0

MISSING LOTAREA SQ.FT. DATA BY NUMBER OF LOTS
Percentage

LANDUSE DISTRICTS	Office	Retail	Indust	Hotel	Cult./Ins	Resid	Govmt	Other	No L.U.	All Uses
Bay View	9.1	15.8	8.6	0.0	1.8	5.9	8.3	3.2	97.8	5.7
Civic Center	22.8	4.2	0.0	3.6	2.0	49.8	0.0	12.6	100.0	36.8
Financial	4.4	8.7	9.7	94.7	2.1	75.6	0.0	8.1	100.0	69.1
Mission	0.0	9.8	6.0	0.0	0.9	2.9	0.0	3.9	100.0	3.1
North Beach	1.5	26.9	0.0	2.5	0.0	29.0	0.0	10.0	100.0	25.2
North Central	7.1	22.3	6.7	3.4	1.1	26.4	0.0	5.7	96.0	24.5
North West	7.8	4.9	0.0	0.0	0.9	5.3	0.0	4.2	100.0	5.1
SOMA	4.3	5.1	2.7	1.0	0.0	31.4	4.2	5.8	99.4	19.4
South West	7.0	4.9	5.2	0.0	2.4	4.8	1.6	4.2	76.0	4.7
Van Ness	1.3	4.9	0.0	6.3	0.0	53.0	14.3	2.2	100.0	46.0
Citywide	6.5	9.6	4.7	72.1	1.4	11.6	2.2	5.0	96.6	12.0

Source: Department of City Planning, Office of the Assesor

The first set of tables (3.4.1.5) shows the distribution of land by Commerce and Industry Districts and Land Use Activities. These data only include lot area and do not include streets, open space, or water areas. The total area of lots within the city, as recorded by the Assessor's Office, accounts for 743 million square feet. More than half of the city land is used for Residential activities. South West and Mission Districts have the largest amount of Residential land which together represent about 70 percent of all Residential land. The next largest concentrations of Residential land are in the North Central and North West Districts.

Three quarters of the Cultural/Institutional land is located within the South West and North Central Districts where the largest medical and educational institutions are located. Almost 90 percent of the Industrial land is concentrated in Bay View and South of Market. Hotel, Office, and Retail land were more evenly distributed across the city than the other activities. Most districts had from 4 to 10 percent of each of these activities.

Civic Center, South of Market, and Financial Districts showed the most diversified land use. Not more than 40 percent of their lot area is in one single use. The Mission District, as a subset of the city, has 85 percent of its land used for Residential activities. The South West and North West Districts had more than 60 percent of their land used as Residential. The smallest percentages in almost all districts were Government, Hotel, and Cultural/Institutional activities. In comparison to all districts, Civic Center had the highest percentage of its land used for Hotel and Government activities, with 11 and 13 percent respectively.

Table 3.4.1.5

TOTAL LOT AREA BY C&I DISTRICTS AND LAND USE ACTIVITIES
(Thousand SQ.FT)
1993

LANDUSE / DISTRICTS	Office	Retail	Indust	Hotel	Cult./Inst.	Resid	Govrnt	Other	Total
Bay View	1,503	1,446	26,232	178	652	16,631	6,457	30,359	83,458
Civic Center	990	1,645	178	1,389	855	4,198	1,678	1,546	12,479
Financial	3,793	2,147	1,772	846	584	2,577	397	1,149	13,264
Mission	462	1,990	2,252	176	2,038	82,873	878	6,673	97,343
North Beach	665	1,295	1,556	745	429	6,407	500	1,127	12,726
North Central	708	2,110	75	654	10,768	38,891	7,287	4,166	64,659
North West	974	2,310	46	43	4,256	52,723	2,520	6,790	69,661
SOMA	4,417	5,161	29,435	855	905	10,803	2,775	17,586	71,937
South West	1,073	11,491	1,065	211	22,456	240,221	6,802	73,277	356,595
Van Ness	646	2,006	87	577	668	7,873	157	1,179	13,192
TOTAL	15,231	31,601	62,696	5,674	43,611	463,199	29,452	143,850	742,591

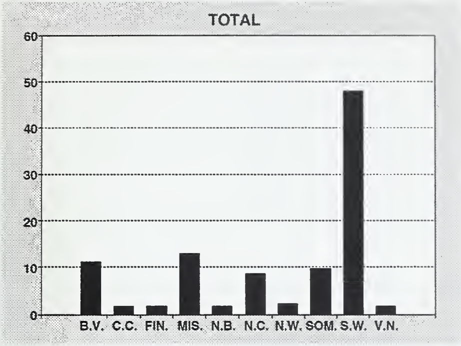
LOT AREA BY C&I DISTRICT AND LAND USE ACTIVITIES
Percentage distribution by land use activities
1993

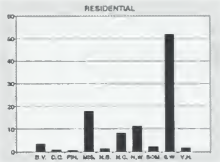
LANDUSE / DISTRICTS	Office	Retail	Indust	Hotel	Cult./Inst.	Resid	Govrnt	Other	Total
Bay View	9.9	4.6	41.8	3.1	1.5	3.6	21.9	21.1	11.2
Civic Center	6.5	5.2	0.3	24.5	2.0	0.9	5.7	1.1	1.7
Financial	24.9	6.8	2.8	14.9	1.3	0.6	1.3	0.8	1.8
Mission	3.0	6.3	3.6	3.1	4.7	17.9	3.0	4.6	13.1
North Beach	4.4	4.1	2.5	13.1	1.0	1.4	1.7	0.8	1.7
North Central	4.6	6.7	0.1	11.5	24.7	8.4	24.7	2.9	8.7
North West	6.4	7.3	0.1	0.8	9.8	11.4	8.6	4.7	2.3
SOMA	29.0	16.3	46.9	15.1	2.1	2.3	9.4	12.2	9.7
South West	7.0	36.4	1.7	3.7	51.5	51.9	23.1	50.9	48.0
Van Ness	4.2	6.3	0.1	10.2	1.5	1.7	0.5	0.8	1.8
TOTAL	100	100	100	100	100	100	100	100	100

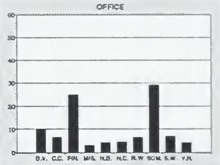
LOT AREA BY C&I DISTRICTS AND LAND USE ACTIVITIES
Percentage distribution by C&I districts
1993

LANDUSE / DISTRICTS	Office	Retail	Indust	Hotel	Cult./Inst.	Resid	Govrn	Other	Total
Bay View	1.8	1.7	31.4	0.2	0.8	19.9	7.7	36.4	100
Civic Center	7.9	13.2	1.4	11.1	6.8	33.6	13.4	12.4	100
Financial	28.6	16.2	13.4	6.4	4.4	19.4	3.0	8.7	100
Mission	0.5	2.0	2.3	0.2	2.1	85.1	0.9	6.9	100
North Beach	5.2	10.2	12.2	5.9	3.4	50.3	3.9	8.9	100
North Central	1.1	3.3	1.0	1.0	16.7	60.1	11.3	6.4	100
North West	1.4	3.3	0.1	0.1	6.1	75.7	3.6	9.7	100
SOMA	6.1	7.2	40.9	1.2	1.3	15.0	3.9	24.4	100
South West	0.3	3.2	0.3	0.1	6.3	67.4	1.9	20.5	100
Van Ness	4.9	15.2	0.7	4.4	5.1	59.7	1.2	8.9	100
TOTAL	2.1	4.3	8.4	0.8	5.9	55.3	4.0	19.4	100

(Other: Vacant and other uses)
Source: Department of City Planning, Office of the Assesor



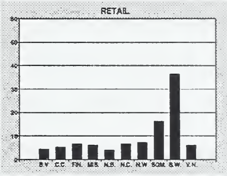


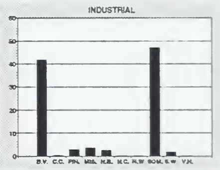


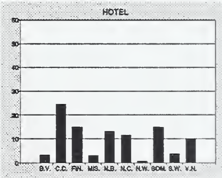
GRAPH 3.4.6 LAND AREA BY LAND USE ACTIVITY

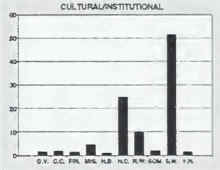
(Percentage distribution of total land by Commerce and Industry Districts)

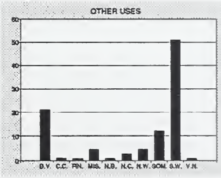
COMMERCE AND INDUSTRY DISTRICTS
B.V. - Bay View
C.C. - Civic Center
FIN. - Financial
MIS. - Mission
N.B. - North Beach/Chinatown
N.C. - North Central
N.W. - North West
SOM. - South of Market
S.W. - South West
V.N. - Van Ness

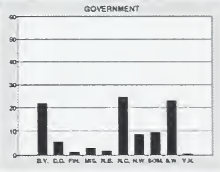












3.4.2.2 Building Use

Table 3.4.16 describes the distribution of building area by Land Use Activity and Commerce and Industry District. There was a total of 542 million square feet of building area in the city as recorded by the Assessor's Office. About 2 percent of the parcels in the Assessor's records did not indicate the amount of building area as shown on table 3.4.14. This total building area includes buildings of any size and any Land Use Activity citywide while the Real Estate Office Space section only includes large buildings functioning primarily as offices located in Downtown and its surroundings.

Almost 50 percent of all building square footage is in the Northern districts of the city. The Financial District accounted for 13 percent, North Central 12 percent, North West 11 percent, and South of Market 11 percent. Thirty percent of the total building area is in the South West District. Most districts have a predominant Residential building space with the exception of the Financial and South of Market Districts which have a predominance of Office space, and Civic Center which has a predominance of Hotel space.

Residential use represented 67 percent of all building area, the largest Land Use category. The second largest is Office, representing 15 percent. All the other uses were less than 6 percent. Almost three quarters of the Residential building area is built on the west side of the city (South West, North Central and North West Districts). Overall, the largest building square footage was found in Residential buildings within the South West District (153 million square feet) and it represented more than one fourth of the total. The second and third were Residential buildings in North Central and North West Districts.

Office and Industrial were the most concentrated uses. Fifty five percent of all Office building space was in the Financial District and 54 percent of the Industrial in South of Market. The fourth largest building space was Office buildings in the Financial District which

Table 3.4.16

BUILDING AREA BY C&I DISTRICTS AND LAND USE ACTIVITIES
(Thousand SQ.FT.)
1993

LANDUSE	Office	Retail	Indust	Hotel	Cult./Inst.	Resid	Govrnt	Other	Total
DISTRICTS									
Bay View	673	490	8,213	43	232	8,695	18	66	18,431
Civic Center	2,994	3,225	65	11,382	1,686	11,386	24	84	30,847
Financial	44,634	7,326	97	6,236	1,130	9,087	0	20	68,530
Mission	528	1,470	2,133	213	586	27,578	0	99	32,606
North Beach	1,837	1,984	249	2,412	281	12,095	0	186	19,044
North Central	902	2,261	34	1,508	2,357	57,513	26	162	64,763
North West	1,120	2,042	114	67	1,951	52,790	0	60	58,144
SOMA	25,480	5,604	13,170	2,132	1,049	13,244	0	595	61,274
South West	1,220	4,212	366	375	2,003	153,197	7	607	181,987
Van Ness	1,474	2,635	42	1,663	779	19,857	156	45	26,650
TOTAL	80,761	31,248	24,483	26,032	12,055	365,440	232	1,924	542,276

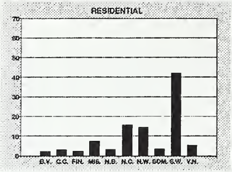
BUILDING AREA BY C&I DISTRICTS AND LAND USE ACTIVITIES
Percentage distribution by land use activities
1993

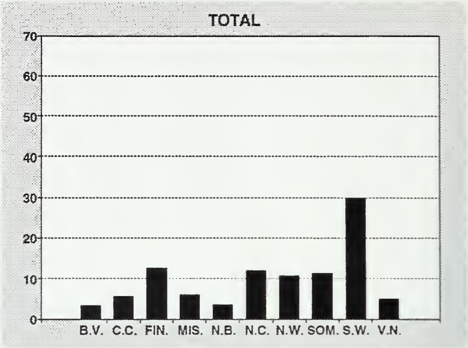
LANDUSE	Office	Retail	Indust	Hotel	Cult.\Inst.	Resid	Govmt	Other	Total
DISTRICTS									
Bay View	0.8	1.6	33.5	0.2	1.9	2.4	7.8	3.4	3.4
Civic Center	3.7	10.3	0.3	43.7	14.0	3.1	10.4	4.4	5.7
Financial	55.2	23.4	0.4	24.0	9.4	2.5	0.0	1.0	12.6
Mission	0.7	4.7	8.7	0.8	4.9	7.5	0.0	5.1	6.0
North Beach	2.3	6.3	1.0	9.3	2.3	3.3	0.0	9.7	3.5
North Central	1.1	7.2	0.1	5.8	19.6	15.7	11.2	8.4	11.9
North West	1.4	6.5	0.5	0.3	16.2	14.4	0.0	3.1	10.7
SOMA	31.5	17.9	53.8	8.2	8.7	3.6	0.0	30.9	11.3
South West	1.5	13.5	1.5	1.4	16.6	41.9	3.2	31.5	29.9
Van Ness	1.8	8.4	0.2	6.4	6.5	5.4	67.5	2.3	4.9
TOTAL	100	100	100	100	100	100	100	100	100

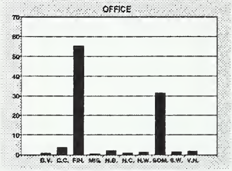
BUILDING AREA BY C&I.DISTRICTS AND LAND USE ACTIVITIES
Percentage distribution by C&I. districts
1993

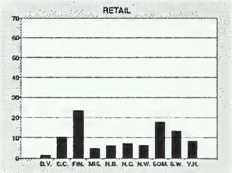
LANDUSE	Office	Retail	Indust	Hotel	Cult.\Inst.	Resid	Govmt	Other	Total
DISTRICTS									
Bay View	3.7	2.7	44.6	0.2	1.3	47.2	0.1	0.4	100
Civic Center	9.7	10.5	0.2	36.9	5.5	36.9	0.1	0.3	100
Financial	65.1	10.7	0.1	9.1	1.6	13.3	0.0	0.0	100
Mission	1.6	4.5	6.5	0.7	1.8	84.6	0.0	0.3	100
North Beach	9.6	10.4	1.3	12.7	1.5	63.5	0.0	1.0	100
North Central	1.4	3.5	0.1	2.3	3.6	88.8	0.0	0.3	100
North West	1.9	3.5	0.2	0.1	3.4	90.8	0.0	0.1	100
SOMA	41.6	9.1	21.5	3.5	1.7	21.6	0.0	1.0	100
South West	0.8	2.6	0.2	0.2	1.2	94.6	0.0	0.4	100
Van Ness	5.5	9.9	0.2	6.2	2.9	74.5	0.6	0.2	100
TOTAL	14.9	5.8	4.5	4.8	2.2	67.4	0.0	0.4	100

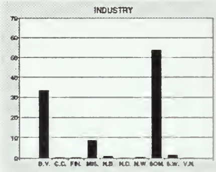
(Other: Vacant and other uses)
Source: Department of City Planning Office of the Assesor





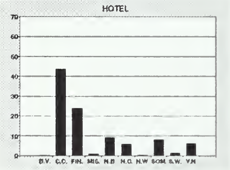


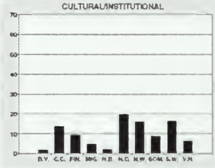


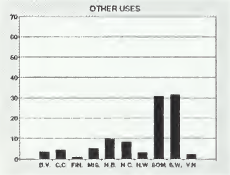


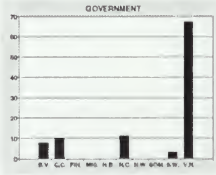
Graph 3.4.7 BUILDING AREA BY LAND USE ACTIVITIES

(Percentage distribution of total building area by Commerce and Industry Districts)









COMMERCE AND INDUSTRY DISTRICTS
B.V. - Bay View
C.C. - Civic Center
FIN. - Financial
MIS. - Mission
N.B. - North Beach/Chinatown
N.C. - North Central
N.W. - North West
SOM. - South of Market
S.W. - South West
V.N. - Van Ness

contained 45 million square feet. Government building space appears concentrated in the Van Ness District. However, it must be noted that some government buildings are included under Office and Cultural/Institutional categories.

Table 3.4.17 presents information about average building area for each square foot of land by Land Use Activity and Commerce and Industry District. This average density is calculated based on lot area. It does not account for open spaces outside of lots such as parks or streets. Among all districts, the Financial District presented the highest density. It had 5.2 square feet of building area for each square foot of land area or a Floor Area Ratio (FAR) of 5.2. This was more than seven times the city wide average. Civic Center and Van Ness had the second highest building density of more than 2 FAR. The lowest density was found in the South West, Bay View, and Mission Districts that are mainly Residential. Their density was less than 0.5 square feet to one square foot of lot area.

The highest density by Land Use Activity was found within the Office category. The average FAR was 5.3 square feet. The second highest density was represented by the Hotel category with a 4.6 FAR. Industrial and Cultural/Institutional categories had lower building densities than Retail and Residential.

The highest density in the city by Land Use and Districts was represented by Office buildings within the Financial District. The average density was 12 FAR which was more than fifteen times the city wide average. The second and third highest densities were found within the Hotel category in the Civic Center (8.2) and Financial (7.4) Districts. Office buildings in the South of Market had also a high density of 5.8. The lowest densities by district were within the Industrial category where almost all districts had less than 0.5 square feet of building space per square foot of land.

Table 3.4.17

AVERAGE BUILDING SQ.FT./LOT AREA BY LANDUSE AND DISTRICT
1993

LANDUSE	Office	Retail	Indust.	Hotel	Cultural/ Institnl	Residntl	Govrmt	Other	Total
DISTRICTS									
BAY VIEW	0.45	0.34	0.31	0.24	0.36	0.52	0.00	0.00	0.22
CIVIC CENTER	3.02	1.96	0.37	8.20	1.97	2.71	0.01	0.05	2.47
FINANCIAL	11.77	3.41	0.05	7.37	1.94	3.53	0.00	0.02	5.17
MISSION	1.14	0.74	0.95	1.21	0.29	0.33	0.00	0.01	0.33
NORTH BEACH	2.76	1.53	0.16	3.24	0.65	1.89	0.00	0.17	1.50
NORTH CENTRAL	1.27	1.07	0.46	2.31	0.22	1.48	0.00	0.04	1.00
NORTH WEST	1.15	0.88	2.50	1.57	0.46	1.00	0.00	0.01	0.83
SOMA	5.77	1.09	0.45	2.49	1.16	1.23	0.00	0.03	0.85
SOUTH WEST	1.14	0.37	0.34	1.78	0.09	0.64	0.00	0.01	0.45
VAN NESS	2.28	1.31	0.48	2.88	1.17	2.52	1.00	0.04	2.02
TOTAL	5.31	0.99	0.39	4.59	0.28	0.89	0.01	0.01	0.73

(Other: Vacant and other uses)
Source: Department of City Planning, Office of the Assessor

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